

NOTICE OF MEETING AND AGENDA
GHI BOARD OF DIRECTORS
OPEN MEETING
Starts at 7:45 p.m.
Thursday, February 16, 2023

VIRTUAL ZOOM MEETING ROOM
Members & Visitors may attend remotely.

1. Approval of Agenda

2. Statements of Closed Meetings

- a. Statement of a Closed Meeting of the Transition and Search Committee Held on February 1, 2023 (Attachment #1a)
- b. Statement of a Closed Meeting of the Board of Directors Held on February 16, 2023 (Attachment #1b)

3. Visitors and Members (Comment Period)

4. Approval of Membership Applications

5. Committee Reports

6. For Discussion/Action

- | | | |
|--|------------|-------------------|
| a. Approve Minutes of the Open Meeting Held on January 5, 2023 (Attachment #2) | 2 Minutes | Discussion/Action |
| b. Revisions to GHI's Records Retention Policy (Attachments #3a-3b) | 10 Minutes | Discussion/Action |
| c. Proposed Amendments to GHI Bylaws | 15 Minutes | Discussion/Action |
| d. Staff's Recommendation to Revise the Pay Scales for GHI Employees (Attachments #4a-4b) | 10 Minutes | Discussion/Action |
| e. Consider Extension of Current General Manager's Employment Until a New General Manager is Hired | 5 Minutes | Discussion/Action |
| f. Proposed Rent Controls in P.G. County | 10 Minutes | Discussion/Action |
| g. Motion to Hold a Closed Meeting on March 2, 2023 | 2 Minutes | Discussion/Action |

7. Items of Information

- a. President's Items
- b. Board Members' Items
- c. Audit Committee's Items
- d. Manager's Items

Ed James
Secretary

NOTE: AT 10:15 P.M., THE BOARD MAY IMMEDIATELY MOVE TO ITEM 7, EVEN IF DISCUSSION OF THE PRECEDING AGENDA ITEMS HAVE NOT BEEN COMPLETED.



GREENBELT HOMES, INC.

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MANAGER'S MEMORANDUM

TO: GHI Board of Directors
FROM: Eldon Ralph, General Manager *Eldon Ralph*
DATE: February 10, 2023
SUBJECT: Items for the **GHI OPEN** Board Meeting on February 16, 2023

GHI Open Meeting

6a. Approve Minutes of the Open Meeting Held on January 5, 2023 (Attachment #2)

Motion: I move that the Board of Directors approve the minutes of the Open Meeting held on January 5, 2023 (as presented/as revised).

6b. Revisions to GHI's Records Retention Policy (Attachments #3a-3b)

In a report to the Board dated December 12, 2017, an Integrated IT Task Force recommended that the Board should revisit GHI's corporate records retention policy to determine what is legally required to be retained, what should be retained for historical purposes, and what should be disposed.

An original corporate records retention policy was prepared by staff in 2009, but it was apparently not reviewed by the Board of Directors at that time. Staff revised the 2009 document; thereafter Attorney Joe Douglass reviewed it and inserted several amendments. Based on Mr. Douglass's advice, GHI's external auditor Wegner CPA's LLP reviewed the draft and expressed satisfaction with the retention time periods for GHI records.

On February 21, 2019, the Board reviewed the draft of the revised policy that staff prepared and directed that it be forwarded to the membership for comment over a period of thirty days. After reviewing the member comments that were received, the Board established a Records Retention Task Force to review the draft policy that staff prepared and recommend changes that should be made.

The Records Retention Task Force submitted a revised draft of the records retention policy which the Board reviewed during a work session on January 26, 2023. The revised draft policy, including changes that resulted from comments during the work session, is presented in

Attachment #3a. A clean copy of the draft revised policy document is presented in Attachment #3b.

This item is on the agenda for discussion and action.

Suggested motion: I move that the Board of Directors adopt the Records Retention Policy document (as presented/as further revised) on February 16, 2023.

6c. Proposed Amendments to GHI Bylaws

Board President Stefan Brodd is proposing that the Board request the membership to consider approving the following two motions regarding Bylaw amendments during the annual membership meeting on May 11, 2023.

- **Motion #1: To remove Article VIII Financial Regulations, Section 11 Expenditure of Funds and Contracts, paragraph d. from the GHI Bylaws, and to re-letter, under the same Article and Section, paragraph e. to d. and f. to e.**

Rationale:

1. This paragraph restricts the ability of the Board of Directors to let certain multiyear contracts in excess of specified amounts. In December of 2022, routine multiyear contracts for grounds maintenance and tree maintenance exceeded these amounts, and so necessitated a special membership meeting.
2. Special membership meetings require considerable time and effort from both the Board and staff to arrange and conduct. There is also always the chance that a quorum is not present, and so the meeting must be rescheduled. It should not be the case that special membership meetings be required for routine business such as the example above. Delays imposed by holding special membership meetings could also result in a gap in needed services or in contractors withdrawing their bids.
3. The interest of the membership in overseeing the fiscal activities of the Board is well served by the provision in paragraph b. of this Article and Section that requires membership approval of any annual increase of ten percent or more in monthly "Operating Payments". This includes multiyear contracts, and is a provision that is easy to understand and to adhere.
4. Publicly revealing the details of contractors' bids, as is necessitated by a special membership meeting, means that competing contractors are able to know each other's prices and may cause the lower bidders to increase their future bid prices. This may possibly lead, in the example given above, to increased prices in the future for grounds and tree maintenance that could have been avoided if the contractors' bids had been reviewed only in closed meetings.
5. GHI staff have identified this paragraph as the most cumbersome and complicated provision in the Bylaws to administer.

6. Fixed dollar amounts should not be included in the Bylaws, since the usual economic environment of low to moderate inflation means that they must be repeatedly adjusted upwards via Bylaw amendments.
- **Motion #2: To replace all instances of Roman numerals in the GHI Bylaws with their equivalent Arabic numerals.**

Rationale:

1. Roman numerals are archaic and not understood by all readers.
2. Roman numerals are not well suited to modern electronic document searches.
3. Roman numerals can be misunderstood, as for example uppercase Roman II being misread as eleven.
4. The current Bylaws are not internally consistent with respect to their use of Roman and Arabic numerals.
5. The GHI Articles of Incorporation do not contain Roman numerals.
6. The new revision of the Member Handbook and Board Policies will not contain Roman numerals.

This item is on the agenda for discussion and action.

Suggested motion: I move that the Board of Directors direct the Manager to request legal counsel to review and advise about the appropriateness of the two motions and rationales for proposed bylaw amendments.

6d. Staff's Recommendation to Revise the Pay Scales for GHI Employees (Attachments #4a-4b)

It is important to periodically adjust GHI's pay scales for groups of employees to ensure that they are competitive with those throughout the Washington Metropolitan marketplace. Staff recommends that GHI should hire a Compensation Consultant every 5 years to review our job classification structure and salary scales. In the meantime, the Board should consider adjusting GHI's pay scales based on either the average annual Consumer Price Index or average annual increase in wages and salaries for private industry workers.

On February 4, 2021, the Board of Directors accepted a report from Compensation GPS (a Compensation Consulting Firm) that included a revised job classification structure and pay scales for staff positions, and authorized the Manager to implement the pay scales that were presented, effective January 1, 2021.

On April 7, 2022, the Board increased pay scales for the various grades of GHI employees by 4.0% over the amounts that were approved on February 4, 2021, based on U.S. Bureau of Labor Statistics which showed that the average Consumer Price Index for the Washington Metropolitan area was 4.0% for the 12-month period ending December 2021, while the wages and salaries for private industry workers had advanced at a 4.2 percent pace.

U.S. Bureau of Labor Statistics show that the average Consumer Price Index for the Washington Metropolitan area was 5.6% for the 12-month period ending December 2022, while the wages and salaries for private industry workers had advanced at a 4.3 percent.

Attachments #4a and 4b show the current and revised pay scales, based on a 5.6 % increase and a 4.3% increase respectively.

This item is on the agenda for discussion and action.

Suggested motion: I move that the Board of Directors authorize the Manager to implement adjusted pay scales as presented for the various grades of GHI employees, which represent a _____% increase over the pay scales that the Board approved on April 7, 2022.

6e. Consider Extension of Current General Manager's Employment Until a New General Manager is Hired

On September 30, 2022, GHI's General Manager Eldon Ralph submitted a letter to the Board stating that he would retire from GHI on February 28, 2023. It is unlikely that a new General Manager will be hired by February 28, 2023. Mr. Ralph has indicated his willingness to continue serving as General Manager at the Board's discretion until a new Manager is appointed. This item is on the agenda for the Board to consider whether to extend Mr. Ralph's employment beyond February 28, 2023.

Suggested motion: I move that the Board of Directors approve an extension of General Manager Ralph's employment with GHI beyond February 28, 2023, until a new General Manager is appointed.

6f. Proposed Rent Controls in P.G. County

Prince George's County Council is considering whether to enact legislation via CB-007-2023, an Act "*for the purpose of temporarily amending the Landlord-Tenant Code to limit landlords' ability to increase rent for certain tenants above a certain amount; providing for certain exemptions; providing that existing obligations or contract rights may not be impaired by this Act; and generally relating to rent restrictions for residential leases and rental dwelling units.*" This legislation is scheduled for public hearing and enactment on Tuesday, February 28th.

During 2020, GHI’s legal counsel advised that under the Prince George’s County Code (see below), a housing cooperative is included under the definition of “Multifamily Rental Facility,” which means that GHI falls within the definition of a “Landlord.”

PRINCE GEORGE’S COUNTY CODE - SUBTITLE 13. - HOUSING AND PROPERTY STANDARDS.

DIVISION 3. - LANDLORD-TENANT REGULATIONS.

Sec. 13-138. - Definitions.

(a) For the purposes of this Division (and Division 4):

(7) **Landlord shall mean the legal and equitable owner(s) of a property, or any portion thereof, used or to be used as a single-family rental facility or a multifamily rental facility and shall include, without limitation, a mortgagee, vendee, contract purchaser, assignee of rents, receiver, trustee, executor, personal representative, lessee, or any person, firm, or corporation who manages the multifamily rental facility by contractual agreement with the owner.**

(9) **Multifamily Rental Facility shall mean any building, structure, or combination of related buildings, structures, and appurtenances, operated as a single entity, housing cooperative ("COOP"), or a condominium, in which the landlord provides for a consideration three (3) or more rental dwelling units;**

Both GHI and GDC may be adversely affected if CB-007-2023 is enacted. The Board should discuss GHI’s position regarding this bill and consider authorizing Board President Brodd to send a letter to the P.G. County Council stating our position.

Suggested motion: I move that the Board of Directors authorize Board President Brodd to send a letter to the Prince George’s County Council by February 28, 2023, requesting GHI and GDC’s Parkway Apartments to be exempted from any rent control restrictions due to the enactment of CB-007-2023.

6g. Motion to Hold a Closed Meeting on March 2, 2023

Motion: I move to hold a closed meeting of the Board of Directors at 7:00 pm on March 2, 2023.

Statement of a Closed Meeting of the Transition and Search Committee Held on February 1, 2023

The Transition and Search Committee held a closed meeting at 7:00 pm on February 1, 2023, via internet audio/video conference to discuss a personnel matter.

The closed meeting was authorized by sub-paragraph §5-6B-19(e)(1)(i) of the Maryland Cooperative Housing Corporation Act.

The motion to hold the meeting was approved by an 8-0-0 vote of the Transition and Search Committee during an open meeting on January 9, 2023.

Statement of a Closed Meeting of the Board of Directors Held on February 16, 2023

GHI's Board of Directors held a closed meeting at 7:00 pm on February 16, 2023, via internet audio/video conference to discuss the following matters, as specified in the noted sub-paragraphs of the Maryland Cooperative Housing Corporation Act § 5-6B-19 (e) (1):

1. Approve Minutes of a Closed Meeting Held on January 5, 2023	(vii)
2. Consider Approval of the Following Contracts: <ul style="list-style-type: none"> • Contract for Information Technology Support Services During 2023 to 2026 - 2nd reading • Separate Contracts for Repairs of Three Units Assigned to GHI 	(vi)
3. Notice from a Bank re: Default on the Share Loan for a GHI Unit Rd	(iv) & (viii)
4. Complaint Matters	(iv)

During the meeting, the Board approved the following contracts:

1. A contract with FSi Strategies to provide Information Technology Support and Management Services, from March 1, 2023 to February 28, 2026, based on the following costs:
 - a) A basic cost of \$2,367 per month or \$28,404 per year, for providing Information Technology Support and Management services.
 - b) A total one-time cost of \$23,100 for cloud migration of all GHI computer files, plus an additional 10% for contingencies, for a total amount not exceeding \$25,410.
 - c) A cost of \$2,400 per year for storage of legacy applications (Micromain Maintenance Management and Jenark Financial) on the cloud, plus an additional 10% for unforeseen price increases, for a total amount not exceeding \$2,640 per year.
 - d) A cost of \$12,192 per year for Microsoft Business Premium software licenses plus an additional 10 % for unforeseen price increases for a total amount not exceeding \$13,411 per year.
2. A contract with Warring Choice Builders to repair a unit assigned to GHI, at the contractor's bid price of \$14,925.00 plus 10% for contingencies, for a total cost not to exceed \$16,417.50.
3. A contract with State LLC to repair a unit assigned to GHI, at the contractor's bid price of \$51,225.00 plus 10% for contingencies, for a total cost not to exceed \$56,437.00.
4. A contract with North American Construction to repair a unit assigned to GHI, at the contractor's bid price of \$65,680.00 plus 10% for contingencies, for a total cost not to exceed \$72,248.00.

A motion to hold the closed meeting was approved during the open meeting of February 2, 2023, by Directors Bilyeu, Brodd, Hess, James, Lambert, Luly, McKinley, Mortimer, and Whipple.

GHI Board of Directors
**Open Meeting
(Virtual Zoom)
January 5, 2023
7:45 pm**

Board Members Present: Bilyeu, Brodd, James, Lambert, McKinley, Mortimer, Whipple

Excused Absences: Hess, Luly

Others in Attendance:

Eldon Ralph, General Manager

Joe Perry, Director of Finance

Deanna Washington, Director of Member Services

Jim Morris, Director of Maintenance

Bill Jones, Audit Committee Chair

Grace Fisher, Audit Committee

David Benack, Audit Committee

Molly Lester, 6-M Hillside Road

Ben Fischler, 14-V4 Ridge Road

Henry Haslinger, 4-A Ridge Road

Claudia Jones, 7-D Laurel Hill Road

Stephanie O'Brien, 6-A Crescent Road

Marcia Aleksiewicz, 33-V Ridge Road

President Brodd called the meeting to order at 8:03 pm.

1. Approval of Agenda

Motion: To approve the agenda as presented.

Moved: James

Seconded: Whipple

Carried: 7-0

2. Statements of Closed Meetings

2a. Statement of a Closed Meeting of the Board of Directors Held on December 15, 2022

GHI's Board of Directors held a Closed Meeting at 7:00 pm on December 15, 2022, via internet audio/video conference to discuss the following matters, as specified in the noted sub-paragraphs of the Maryland Cooperative Housing Corporation Act § 5-6B-19 (e) (1):

1. Approve Minutes of a Closed Meeting Held on November 3, 2022	(vii)
2. Request by an Applicant for Membership for Exceptions to GHI's Membership Selection Criteria Policy	(iv)

3. Discussion of a Personnel Matter	(i)
4. Consider Approval of the Following Contract: • 2023-2025 Pest Control Contract -1 st reading	(vi)
5. Discussion of Complaint Matters	(iv)

A motion to hold the Closed Meeting was approved during the Open Meeting of December 1, 2022, by Directors Bilyeu, Brodd, Hess, James, Lambert, Luly, McKinley, Mortimer, and Whipple.

2b. Statement of a Closed Meeting of the Board of Directors Held on January 5, 2023

The Closed Meeting is still in session, so the Statement of Closed Meeting for January 5, 2023 will be delivered at the January 19, 2023 meeting.

3. Visitors and Members (Comment Period)

Claudia Jones, 7-D Laurel Hill Road, thanked the Board for their response to her email regarding placement of the after-hours emergency maintenance number on the Yardi Member Portal and in E-News Alerts, but would also like to see the non-emergency number on the GHI answering service. Claudia also thanked the Board and staff for responses she received to questions posed in an email dated October 3, 2022. Claudia inquired on the status of approximately 150 trees that were removed in 2021 and the 108 remaining to be replaced. Per Claudia's explanation, only 42 trees had been replaced, so she requested that the Board consider the schedule for those replacements on a future Board agenda. President Brodd thanked her for her comments and advised they would take her suggestions under consideration.

4. Approval of Membership Applications

None.

5. Committee Reports

Secretary James reported that the Woodlands Committee held their first monthly meeting of the year on Wednesday, January 4, 2023, during which they continued working on the Eagle Scout project proposal for Parcel M and reviewed recent Dynamic Governance training sessions.

They have held two Woodlands Committee Dynamic Governance Training sessions. The first session was on Tuesday, December 20, 2022, and the second session was on Tuesday, January 3, 2023.

They are continuing to hold Woodlands Committee Stream Study Group meetings, with the next one scheduled for Tuesday, January 10, 2023.

They held a Woodlands Committee Workday on Saturday, December 17, 2022 at 10 am during which they did an exploratory walk through Parcel M in preparation for the proposed Eagle Scout project.

The next Workday will be on Sunday, January 8, 2023 from 9 am to noon above the Hillside Road underpass. They will continue to remove invasive plants in preparation for planting native plants.

The next regular monthly Woodlands Committee meeting is scheduled for February 1, 2023 at 5 pm.

Vice-President McKinley reported that the Storm Water Management Subcommittee would be holding an informational meeting with Terri Hruby on January 9, 2023 to obtain assistance in preparing material for the Pervious Surface Material Usage Policy the subcommittee is working on. The subcommittee has received information that the city is preparing a grant application for a resiliency study that would cover the entire city, including GHI. A GHI member informed the subcommittee that the city might be exploring a solution to the “Red Brick” apartments, but there had not been any confirmed information.

6. For Discussion/Action

6a. Approve Minutes of the Open Meeting Held on November 17, 2022 (Attachment #2)

Motion: I move that the Board of Directors approve the minutes of the Open Meeting held on November 17, 2022 as presented.

Moved: James

Seconded: McKinley

Carried: 7-0

6b. Bicycle Committee's 2022 Year-End Report (Attachment #3)

Attachment #3 is a report from the Bicycle Committee regarding activities during 2022.

This item is on the agenda for discussion and action.

Motion: I move that the Board of Directors accept the report from the Bicycle Committee regarding activities during the year 2022.

Moved: James

Seconded: Mortimer

Carried: 7-0

6c. Review GHI 2022 3rd Quarter Financial Statements (Attachment #4)

GHI's 2022 3rd Quarter Financial Statements are submitted as Attachment #4 for your review. GHI's Director of Finance Joseph Perry presented the report and answered questions.

This item is on the agenda for discussion.

6d. Review Status of the Board's 2022-2023 Action Plan (Attachment #5)

Attachment #5 is the 2022-2023 Board Action Plan as of December 31, 2022. The Board should review the tasks that are in progress, include additional tasks that are a high priority, and discuss steps to initiate high-priority tasks in the Board Action Plan that have not yet begun.

No formal action was taken.

6e. Motion to Hold a Closed Meeting on January 19, 2023

Motion: I move to hold a Closed Meeting of the Board of Directors at 7:00 pm on January 19, 2023.

Moved: Bilyeu

Seconded: James

Carried: 7-0

7. Items of Information

7a. President's Items

President Brodd gave well-wishes to all for 2023.

7b. Board Members' Items

Vice-President McKinley congratulated Director Lambert on her recent space experience.

Director Lambert thanked everyone for their commendation on her recent space experience.

7c. Audit Committee's Items

None

7d. Manager's Items

None

Motion: To adjourn.

Moved: James

Seconded: Bilyeu

Carried: 7-0

The meeting adjourned at 8:48 pm.

Ed James
Secretary



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REVISED

Record Retention Policy

February 2019

Revised February 2021

Second Revision April 2021

Third Revision May 2021

Fourth and Final Revisions July 2021

Item 6b. Attachment #3a



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Recommended Revisions February 2023



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Table of Contents

PURPOSE

PURPOSE 4

IMPORTANCE OF ARCHIVAL MATERIAL.....4

GHI has possession of primary source materials important to the founding of the federal planned community and of the housing cooperative. Many of these records are original and unique copies that cannot be consulted elsewhere, including the Library of Congress and the National Archives. These records include a daily log of workers on the job, their worksites, and tasks; iterations of the Member Handbook over the history of the community; various newsletters and community communications that are likely to be found only in the mementos of residents; and numerous maps and plats.4

Such records can never be replaced.....4

RETENTION REQUIREMENTS.....5

Security Safeguards.....8

Compliance Oversight.....10

RETENTION SCHEDULE11

Management Office.....15

Member Services.....17

Finance & Accounting Department.....18

General & Support Services.....21

Human Resources23

Information Technology.....25

Maintenance/Technical Services/Homes Improvement27

Transitory Records.....28



PURPOSE

The purpose of this Record Retention Policy is to specify the lengths of time that books and records of Greenbelt Homes Inc. (GHI) and Greenbelt Development Corporation (GDC), shall be kept and the procedures for disposing of such documents at the end of their retention periods. These books and records may be in paper format (e.g., documents, papers, letters, contracts, maps or books); electronic format e.g. tapes /discs, photographs, film or sound recordings, and data- or image-processed documents that are stored on computers.

Books and records are to be kept and managed in a consistent and organized manner, to comply with applicable legal and regulatory requirements, promote business efficiency, minimize expense for unnecessary storage, and to make it easier to locate records when needed.

The record retention periods specified in this policy are based on the need to keep records for historical reference; to satisfy contractual, legal or regulatory requirements; and for other purposes as set forth in this policy. GHI/GDC staff members must dispose of records that have satisfied their required period of retention and are no longer needed.

GHI/GDC expects all officers, directors, employees, contractors, volunteers and any other agents or representatives to follow the rules and procedures set forth in this policy document.

IMPORTANCE OF ARCHIVAL MATERIAL

GHI has possession of primary source materials important to the founding of the federal planned community and of the housing cooperative. Many of these records are original and unique copies that cannot be consulted elsewhere, including the Library of Congress and the National Archives. These records include a daily log of workers on the job, their worksites, and tasks; iterations of the Member Handbook over the history of the community; various newsletters and community communications that are likely to be found only in the mementos of residents; and numerous maps and plats.

Such records can never be replaced.

The GHI co-operative began as a planned community built by the Resettlement Administration, one of President Franklin D. Roosevelt's New Deal initiatives intended to provide relief to those suffering



from the economic downturns of the Great Depression. Rexford Guy Tugwell, an assistant Secretary of Agriculture and the first head of the RA, planned to build a series of *"cooperative communities where the built environment would reinforce community spirit and cooperation among its residents."* (Greenbelt Museum) Drawing inspiration from Ebenezer Howard's green town model in England, Tugwell's green towns would combine "the best aspects of a rural life: lakes, woods, and open spaces with the best aspects of an urban life: recreational facilities, theaters and shops" (Greenbelt Museum). Tugwell's plans were controversial and potentially expensive, so only three green towns were actually constructed--Greendale, WI; Greenhills, OH; and Greenbelt, MD.

Of the three original green towns, Greenbelt is the most intact, due to the fact that the housing units - brick, block, and frame dwellings - were purchased from the federal government in 1952 by a co-operative group of residents. This cooperative, initially called the Greenbelt Veteran Housing Corporation, is now Greenbelt Homes, Inc.

The story of Greenbelt Homes, Inc. is central to the story of the unique city of Greenbelt. It has major achievements that include preserving the original structures, parks, and pathways of the planned community while also outfitting them for post-modern living. This stewardship of the original, historic fabric of the community, and the fostering of the cooperative spirit, has allowed the atmosphere and quality of life championed by Rexford Guy Tugwell and the RA to continue to survive and flourish.

Greenbelt has been the subject of more than 15 books, numerous articles, films, videos, documentaries, and numerous masters and doctoral thesis. It attracts visitors from all over the world for its significance to the history of planned communities; utopian experiments; the co-operative movement; the Great Depression and New Deal; and the history of landscaping, architecture, and mid-twentieth century material culture.

RETENTION REQUIREMENTS

Electronic records subject to these retention requirements include those records maintained on GHI/GDC computers and other electronic devices that are provided to employees for business use. However, if you use a personally owned device for GHI/GDC purposes, either on the organization's premises or elsewhere, any GHI/GDC business documents on the device are also subject to these retention requirements.

It is the content of the record that determines its retention period. For instance, an email can be a very significant correspondence with a 20 year retention period or a casual communication that can



be deleted immediately. As set forth herein, GHI/GDC attempts to define retention periods based upon content type. To the extent the retention period is not clear; the document should be retained for not less than three years, and the General Manager or his/her designee must approve the deletion of the document.

As circumstances may dictate, the General Manager or his/her designee may issue a "legal hold," suspending the destruction or deletion of any records due to pending, threatened, or otherwise reasonably foreseeable litigation, audits, investigations, or similar proceedings. If and when GHI/GDC staff is informed of such a hold, any documents relevant to the matter must not be destroyed or deleted until the General Manager or his/her designee, after consultation with GHI legal counsel, removes the "legal hold." The "legal hold" directive must inform staff of the specific types of documents that must be retained for these purposes. If in doubt as to what is relevant, staff are required to seek clarification from the General Manager or his/her designee before destroying or deleting any document. The directive must also make clear the time period for which the documents must be retained. During that retention period, any document that may be relevant must not be destroyed or deleted without the **prior** written approval of the General Manager or his/her designee.

No officer, director, employee, contractor or volunteer of GHI/GDC shall knowingly destroy or delete a document with the intent to obstruct or influence any investigation or proper administration of any matter by any government department, court or agency. This requirement covers all records and documents of GHI/GDC.

Archival Records should be retained in perpetuity and may NOT be destroyed except in cases of severe damage due to fire, smoke, water, rodents, insects, mold, or extreme disintegration.

In all other circumstances, documents listed in the schedule below must be retained for the periods of time set forth on this schedule. Please note that the information listed in the schedule below is intended as a guideline and may not contain all records that may be required to be retained in the future.

Records exist in electronic, hard copy (paper) and other formats. The following are types of records:

1. **Transitory Records.** A transitory record is a record with short-term value and does not have to be kept for the full retention period. Examples of transitory records generally include:
 - a) preliminary drafts of letters, reports, pleadings, etc., after the final is prepared and the drafts are no longer useful;



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- b) duplicate copies of documents already on file, that have been retained only for convenience;
- c) casual e-mail or written correspondence about scheduling or other matters that have no substantive significance;
- d) routing slips, voice-mail, phone messages, miscellaneous notices or memoranda;
- e) additional information copies of widely distributed materials or information received as part of a distribution list, list servs and other Internet distribution sources, solely for convenience of reference;
- f) duplicate stocks of obsolete publications, pamphlets or blank forms; and
- g) unsolicited advertising.

Notwithstanding the foregoing list, there may be instances where a particular otherwise “transitory record” may have important legal or other significance and should not be deleted or destroyed. The General Manager or his/her designee should be consulted about any such record before destruction or deletion.

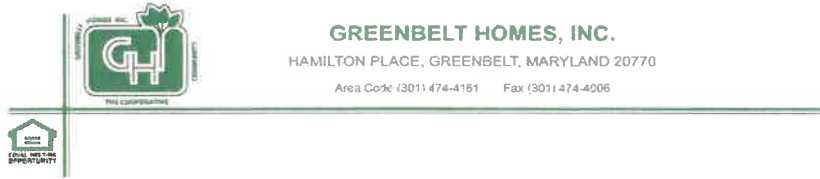
2. **Electronic Records.** In general, GHI/GDC staff must store records in electronic form, rather than in paper format, on GHI’s document server.
3. **Archival Records.** These are records that a department has stored for the required retention period and no longer are in regular use, but may be of sufficient historical importance that they should be kept indefinitely or permanently.

Archives and Archival Records.

Archives refers to the specific location where *archival records* are preserved and made available to researchers of all types, including GHI staff.

Archival documents are the original documents and are considered *primary sources*, having been created at the time of the events they describe by participants or witnesses of those events. The format of these documents does not matter; they can be paper documents, maps, photographs or even digital files. *Primary sources* that exist only as a copy of the original should be given the same consideration.

Archival Records should be retained in perpetuity and may NOT be destroyed except in cases of severe damage due to fire, smoke, water, rodents, insects, mold, or extreme disintegration.



Disposing of Records

Transitory records must be deleted or disposed of when they have no further business value. Electronic non-transitory records must be disposed of at the end of their retention period. Records containing confidential or sensitive information must be shredded, permanently deleted or otherwise disposed of in a manner that ensures that the information may not be disclosed. Paper records that do not contain confidential or sensitive information may be recycled or simply discarded. When paper records (other than transitory records) are disposed of, each department is responsible for creating and maintaining a record showing the following:

- a) Type of record disposed;
- b) Method of disposal;
- c) Name of the supervisor authorizing the disposal; and
- d) Date of the disposal.

To remain in compliance with GHI/GDC requirements, GHI/GDC staff will:

- Maintain and enforce security procedures
- Keep records and monitor security issues
- Communicate security information and requirements to appropriate staff or IT providers, and coordinate and conduct security awareness training for staff
- Conduct quarterly review of User ID network passwords
- Report any evidence of unauthorized access or known security breaches

Security Safeguards

1. Only authorized staff will have access to the shared drives on company computers and other document repository systems or other computer software programs.
2. All users of the GHI/GDC systems will have a current signed User Agreement on file.
3. GHI/GDC will keep a record of all authorized users, including date access was granted and date access was revoked, if applicable.
4. All employees issued keys will complete a form acknowledging receipt. These employees will sign a log with their name, date of issue and date of return.
5. Work areas containing sensitive information will be shielded from the public.
6. Unauthorized staff or other unauthorized persons shall not be given access to work stations and computers of authorized persons.



7. GHI/GDC staff will not leave resident folders exposed on desk tops or computer screens open with sensitive data unattended.
8. GHI/GDC staff will never take any resident files home for any reason. If it is necessary to transport resident files between GHI/GDC offices, the files will be transported in a secure manner.
9. GHI/GDC staff must remove member/resident printouts from the printer immediately to ensure that nothing is inadvertently left vulnerable to unauthorized access.
10. Member/Resident credit, income, and other reports should be retained for the duration of the membership/tenancy, plus three years from the end of the membership/tenancy.
11. GHI/GDC staff will keep a log of all documents shredded, including name of employee disposing of document, description of document, method of disposal and date of disposal.
12. At the close of business each day, member/resident files (if applicable) will be locked in file cabinets and the file cabinet areas will be locked. In addition, member/resident and applicant information must not be accessible or visible to non-GHI/GDC staff or non-approved third party management.
13. GHI/GDC staff will review security procedures periodically to ensure compliance and safeguard against breaches.

Research and Storage of Archival Records

1. The GHI Archives shall be located in an appropriate location that enables the preservation and public access to all archival and archived materials in the collection. This location and access schedule should be chosen according to the proper archival standards.
2. All archival records shall be housed in the archives. Additional material culture (items such as architectural remnants, signage, and other materials original to the community) shall be identified in the retention schedule.
3. A finding guide shall be created for GHI's archival records.
4. GHI's archives and archival records shall be readily available for members, staff, and researchers to consult, browse, and research.
5. GHI archival records that are digitized shall NOT be destroyed but retained in long-term storage with proper climate control.
6. Ideally, in the future, GHI should employ a full-time archivist for the collection. This position could begin as a part-time position and grow in the future to serve an archivist/preservationist role for GHI.
7. If the cost and logistics of properly housing and preserving archival material becomes unduly burdensome, transferring the records to another repository may be considered.

Commented [1]: Added specific examples of material culture based on worksession comment.



However, any corporate documents should not be transferred out of the holdings of the corporate office.

Care and Handling of Archival Records

1. Documents, photos, maps, plats, etc. that are very brittle or otherwise very fragile may NOT be digitized.
2. Sheets of paper including maps and plats should be stored flat in acid free file folders in acid free boxes or cabinets.
3. Sheets of paper that are brittle or otherwise fragile should be stored in mylar sleeves.
4. All photographs must be stored in mylar sleeves.
5. Documents in binders must be re-housed in acid-free binders or files or boxes.
6. All staples, metal paper clips, and brads must be removed and replaced with plastic fasteners.

For more information on how historic preservation can benefit the cooperative community, consult the report submitted by the GHI Ad Hoc Task Force on Historic Preservation. That report can be requested by visiting Member Services.

Compliance Oversight

The General Manager is responsible for enforcement of this requirement. Please direct any questions regarding the retention of documents not listed in this schedule to the General Manager.

Please note that failure to follow this requirement can result in possible civil and criminal sanctions against GHI/GDC and its officers, directors and employees, and possible disciplinary action against responsible individuals, up to and including termination of employment.



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

RETENTION SCHEDULE

Archival Documents and Materials

Document Category	Document/Record Description	Retention Period
<p>Any and all materials that are dated or can be dated prior to 1953 - the year that the community passed from federal ownership to cooperative ownership - are automatically considered archival records and as such shall be preserved and protected in the GHI Archives for use by GHI members, staff, and interested members of the general public. They shall be preserved in their original condition even if the material is transferred into a digital format.</p> <p>The list of organizations, entities, and corporations associated with Greenbelt Homes, Inc. includes but is not limited to: Greenbelt Mutual Housing Association (1946) Greenbelt Mutual Home Ownership Corporation (1947-49) Greenbelt Veteran Housing Corporation (1949 - 1957) Greenbelt Development Corporation Greenbelt Land Improvement Corporation Share Servicing Loan Corporation Greenbelt Homes, Inc. Development Corporation (for 1979 rehab)</p>		
Planning and Construction documents ca. 1935 to 1939	Any documents concerning the planning and construction of the original planned community, including residential, commercial, and industrial structures. Documents dated prior to January 28, 1936 may include the title "Berwyn Project" or "Beltsville Project". These include daily progress reports, material invoices, correspondence, and other printed material, and cartographic and photographic media.	Permanent
Planning and Construction documents ca. 1940 - 1945	Any documents concerning the planning and construction of the defense home community, including residential, commercial, and industrial structures. These include daily progress reports, material invoices, correspondence, and other printed material, and cartographic and photographic media.	Permanent

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Approved Board Minutes and Agendas dated before 1953	Approved official minutes and agendas of open and closed meetings of the Board of Directors of Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above. The board recommends that these documents be scanned and kept in one repository with all minutes.	Permanent
Photographs	All photographs related to the planning and construction of Greenbelt. Includes any and all original photographs of community and/or member activities and events of any date. Includes any and all original photographs of residences and other structures original to the planned community, the defense community, or structures built by the cooperative. All photos must be assessed and curated prior to disposal decision.	Permanent
Maps and Plats	Any original copies of maps and plats concerning the planning and construction of Greenbelt. This includes any and all maps and plats that are undatable and any and all that are datable prior to 2000.	Permanent
Tenant and Member Handbooks	This includes copies of the federal tenant handbook (ca. 1937 to 1953) and the cooperative member handbook (ca. 1953 to present).	Permanent
Visitor Correspondance	This includes any and all correspondence with visitors, including visitor logs from the community's early years (ca. 1937 - 1941).	Permanent
Architectural Fragments and Signage	Architectural fragments are considered character-defining features of the	Permanent

Commented [2]: Added "permanent" designation based on worksession comment.



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

	<p>buildings and deserve to be preserved as carefully as the archival records. Other bits of material culture from Greenbelt's history, such as signs, should be given equal consideration.</p>	
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Materials for Archives

<p>The following materials shall be included in the archives as a record of the history of the community as a cooperative following the 1953 sale by the federal government. These materials shall be accessible to GHI members, staff, and interested parties of the general public. Best practices dictate that these materials should be digitized for research purposes and the original medium - though not of primary concern - be preserved as best as possible. These records should not be transferred from the corporate office.</p>		
<p>Approved Board Minutes and Agendas **1953 to 2000** **2000 to 2030**</p>	<p>This includes approved official minutes and agendas of open and closed meetings of the Board of Directors of Greenbelt Homes, Inc. and Greenbelt Development Corporation (GDC) and any subsidiaries.</p> <p>Approved minutes, agendas, and reports for GHI committees, subcommittees, and task force meetings and projects.</p>	<p>Permanent</p>
<p>Annual Meeting Minutes, Agendas, and Reports</p>	<p>This includes approved minutes, agendas, agenda packets, and other materials related to the annual membership meeting of Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above.</p>	<p>Permanent</p>
<p>Articles of Incorporation and Dissolution</p>	<p>Including any incorporation and/or dissolution documentation, and any amendments thereto, of GHI and any other subsidiaries or corporations which GHI has owned or been a part of.</p>	<p>Permanent</p>
<p>Bylaws</p>	<p>This includes approved bylaws and any amendments thereto of Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above.</p>	<p>Permanent</p>
<p>Certification of Election Results</p>	<p>This includes any documents detailing the total number of votes cast and the total vote tally for each individual</p>	<p>Permanent</p>



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4151 Fax (301) 474-4005

	candidate during membership meetings.	
Stock Ledgers	This includes stock ledgers and any associated materials for Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above.	Permanent
Mutual Ownership Contracts	Since the terms, conditions, and language of the contracts have varied over the years, care should be taken to document and catalogue a sample of the contracts over the years, taking care to redact any sensitive information in these contracts.	Permanent but not kept in Archives.
Audited Financial Statements	These records are important for understanding fee trends that affect the entire membership.	Permanent but not kept in Archives.
Land Records	These records are valuable resources for both historic and institutional research and include: <ul style="list-style-type: none"> ● Mortgage Records ● Deed Transactions 	Permanent but not kept in Archives.
Member Relations	This includes material relating to the corporation's interaction with the membership, including: <ul style="list-style-type: none"> ● community or member relations newsletters and publications ● marketing materials such as posters, flyers, and brochures ● membership rolls ● member referendum records ● member petitions ● demographic studies ● electronic newsletters, including E-News. 	Permanent
Commemorative Materials	This includes any and all materials relating to celebrations and commemorations of milestone anniversaries, such as (but not limited to) 5-yearly anniversaries of the construction of the community in 1937.	Permanent
Single-Family Home Construction	Documents relating to the deliberation,	Permanent



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4151 Fax (301) 474-4006

	building, financing, and management of single-family homes.	
Cooperative Endeavors	Publications and other materials detailing GHI's participation in the national and international cooperative movement.	Permanent
GHI Rehabilitation Project ca. 1979 - 1984	Includes documents, correspondence, photographs, and other primary source material related to the GHI Rehab Program.	Permanent
GHI Homes Improvement Program (HIP) ca. 2016 - 2021	Includes documents, correspondence, photographs, and other primary source material related to the GHI Homes Improvement Project.	Permanent
Replacement Reserves Studies Replacement Reserve Studies for Additions	Documents from professionally prepared studies of the replacement reserves and provide details including the structure of member fees. These studies provide important knowledge-based documents for staff and researchers.	Keep but not in archives
Partnerships and Projects with Federal/County/City Governments/Educational Institutions	These documents include efforts to make GHI more racially economically and ethnically diverse and would be useful to researchers and members.	Keep but not in archives

Management Office

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Document Category	Document/Record Description	Retention Period
Approved Board Resolutions	Formal statements of decisions made by the Board of Directors of GHI and GDC.	Permanent
Approved Board Meeting Minutes	Approved official minutes of open and closed meetings of the Board of Directors of GHI and GDC.	Permanent
Board Agenda Materials	Includes regular and special meeting agendas, Board reports, committee packets, manager's memorandum, and records distributed or otherwise submitted into the record during a regular or special meeting.	Permanent
Board Files	Files containing information on former Board members, articles of dissolution, etc.	Permanent
Maryland Local Government Tort Claims (LGTC) Notices	Court documents/records related to injury or other matters covered under Maryland Tort claims.	4 years (except for a claim involving a minor, which is 21 years)
Memoranda of Understanding (MOU)	MOU or Agreement between GHI/GDC and any federal, state or governmental entity or non-profit corporation. General Counsel will determine if other retention period is necessary.	10 years from the termination of the agreement
Records Retention and Disposition Files	Records documenting the destruction of damaged records that could not be recovered, inventories, disposal requests and authorizations, schedules and reports, etc.	Permanent
Public Meeting Notices	Board public/special meeting notices, including proof of posting and/or publication.	5 years
Recordings of Open Session Meetings	Video and audio tape recordings of meetings.	Until minutes of the meeting are approved.
Strategic Plans	Annual Strategic Plan and 5-Year Plan Public notices (including posted and published notices); materials presented at public meetings; agendas, reports and minutes of meetings at which the plan is considered and/or approved, and executed copies of any adopted resolutions related to the Plan. Also includes originals of the written comments received from the membership concerning the Plan and copies of any GHI/GDC correspondence responding to the same.	5 years for Annual plan; 15 years for Five-Year Plan



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4151 Fax (301) 474-4005

Member Services

Document Category	Document/Record Description	Retention Period
Complaint matters	Records related to member complaints, lease violations, investigation activities, correspondence, supporting documentation, etc.	5 years after closure of the complaint.
Reasonable Accommodation Requests	Reasonable Accommodation Request form, interpreter requests, letters/notes, appeals, salary etc.	5 years after determination or action. Immediately shred records containing medically sensitive information following determination or store on secure server (unless appealed, then destroy after appeal decision).
Waitlist Applications for GDC Parkway Apts.	Includes documentation of the activities involved in the preparation, maintenance and publication of the certified waiting list.	5 years
Complaint Panel/Informal and Formal Hearing Records	Includes audio recordings, recommendations, and records of any panel or hearing, copies of all documents, records, requests, and exhibits submitted for the panel/hearing, Board's written decision, and notices/correspondence regarding the outcome.	5 years after decision
Criminal Background Check Results	Includes results from database criminal history record information and fingerprint checks.	Shred immediately (If appealed, shred upon completion of hearing or due process)
Investigation Case Files	Member Services complaint investigation records including, photographs findings, includes original documents such as correspondence, notices, materials from formal and informal hearings and investigative reports, etc.	5 years after agency action or final judgment
Member Services/ GDC Parkway Apt. File Records	Includes mediation agreements, participation forms, non-transitory correspondence (including letters of information or corrective action), substantive legal notices (including rent adjustments), reports, notes and other materials documenting interactions with member/resident, inspection records, etc.	5 years after move out participation ends
RV/Boat Lot and Storage Files	Boat lot and storage leases, supporting documentation, forms, etc.	5 years after lease ends
Transfer Waiting List Activity File re: GDC Parkway Apts.	Documentation of transfer requests for administrative, emergency, or reasonable	5 years after participation ends



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code: (301) 474-4161 Fax: (301) 474-4006

	accommodation including outreach activities, intake and processing of applications, notices, and other activities related to offering units, etc.	
Vacated Resident – Debt Owning Files re: GDC Parkway Apts.	Retain records concerning debts owed or termination of assistance until the debt is paid in full.	12 years after end of participation
Vacated Resident– Do Not Re-Admit re: GDC Parkway Apts.	Permanently retain documentation used to substantiate fraudulent misreporting of income.	Permanent
Vacated Resident – Good Standing re: Parkway Apts.	Retain files of participants who vacated the premises without owing money and are in good standing.	5 years after participation ends
Vacated Resident - Accounts Receivable (Debt Collection) re: Parkway Apts.	Includes record copies of court judgment, judgment liens and/or tax intercept records, copies of records documenting the receipt of payments made in satisfaction of the judgment, and copies of applicable repayment or settlement agreements. Includes financial statements and bank deposit statements related to moneys owed by participants/residents. Requires periodic review.	Retain until the end of the 12-year judgment period plus an additional 10 years or when judgment is satisfied plus 12 years, whichever occurs first

Finance & Accounting Department

<u>Retention Category</u>	<u>Document Description</u>	<u>Retention Period</u>
Accounts Payable	Supporting documentation on accounts paid by GHI/GDC, such as vendor pay packages, purchasing cards, out-of-town travel and wire transfers. Files also include general ledger interface reports, check run reports and transmission, cash receipts, etc.	5 years after audit
Accounts Receivable	Documentation related to receivable records such as invoices, ledgers, schedules, checks, money orders (remote deposit) etc.	5 years after audit
Audit	Includes the following records: approved accounts analysis packets, staff working papers, audit related correspondence and GHI/GDC responses to questions arising during the process. Financial audit report, auditor’s management letter, and responses to the auditor’s management letter.	Permanent
Bond Accounting/Cash Management File	(a) For records pertaining to general obligation bonds (b) All other records including cash management investment tickets that contain details of investment transactions such as purchase of investment pools, certificates of deposit, bonds, commercial papers, repurchase agreements, or other securities.	(a) 12 years (from end of fiscal year) (b) 5 years
Budgets	Staff reports and back-up documentation, including department budget submissions, worksheets/analysis, adjustments, and salary surveys.	Permanent

Commented [3]: Added "permanent" designation based on worksession comment.

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Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Cash/Financial Management	Petty Cash reconciliation, deposit records, wire transfer documents, checks, returned deposit items, GHI/GDC bank statements/activity logs, stop payments, etc.	5 years after audit
General Accounting	Records including approved general ledger account reconciliation, fluctuation analysis, source data, monthly electronic confirmation, bank statements, bank activities and transactions reports, approved bank reconciliation and related schedules, documentation supporting adjustment, monthly statements of reserve accounts held by various trustees, copies of checks received by GHI/GDC, deposit tickets, journal entries pertaining to loan receipts, various income streams, grants, electronic banking activities.	Permanent
Debt Collection	Includes records of court judgment, judgment liens and/or tax intercept records, receipt of payments made in satisfaction of the judgment, and copies of applicable repayment or settlement agreements. Should have periodic reviews during the retention period.	12 years after judgment is satisfied or 12 years after judgment renewal
Payroll Accounting Records	Employee files containing payroll documentation, including address, dates of birth, occupation, compensation, hire and termination dates. Also includes individual contracts; wage/hour notices; records of additions to or deductions from wages, including documentation of payments by GHI/GDC on behalf of employees for taxes, benefit plans, the employee retirement data and other deductions; deduction authorization; beneficiary designations, unemployment claims, tax levies, withholding orders and garnishments and W-2 forms.	6 years after audit
Payroll Rate and Time Records	Includes time cards and records that document actual hours worked by employees and amounts of leave taken. Includes leave accrual and usage records; authorization for extra hours, overtime documentation.	6 years after audit
Payroll Registers	Electronic files documenting benefits, payroll, and other payments to or on behalf of employees.	6 years after audit
Purchasing	Includes requisitions for purchase orders, blanket orders, encumbrance release orders and contract orders, credit card statements and records of card users.	5 years after final payment
Repayment/Settlement Agreements	Records related to repayment and settlement agreement such as signed repayment agreement payments received, judgment, lien or tax intercept records, etc.	12 years after term of agreement ends
Tax Records	Tax returns with any related and/or supporting documentation including registration renewals and statements of information for various entities, 1099 reports for owners and vendors, IRS Annual Return of Withheld Federal Income Tax (Form 945), IRS	7 years after audit

Commented [5]: Added "permanent" designation based on worksession comment

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

	Application for Tax Exempt Status, determination letters, annual returns, etc.	
Parkway Resident Accounting	Documentation related to resident accounts receivable and ledger records such as invoices, ledgers, cash receipts (rent and security/sure deposits), security deposit records (including refunds), etc.	5 years after audit
Expense Records	Reports completed by employees to reconcile various expenses, including travel.	5 years
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to Finance and Accounting. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

General & Support Services

Retention Category	Document Description	Retention Period
Audit Records (Departmental)	Retain departmental budget background records accumulated in the preparation of annual budget estimates until covered by the budget. Does not include official audit records for which the Finance Department is the Department of Record.	4 years after the close of the fiscal year
Vehicle Title and Registration Records	Warranty documents, Department of Motor Vehicle title and registration records.	Life of vehicle plus 4 years
Equipment Records	Includes original operating instruction booklets, service agreements, warranty information, replacement part information, technical reference booklets, purchasing information, and owners' manuals which document the use and maintenance of equipment purchased by the department.	Life of equipment plus 4 years
Legal Advertising	Includes published or posted legal notices, original proofs of publications and other legal publications.	5 Years after publication
Membership Records	Includes records in support of GHI/GDC's payment of membership of staff in professional organizations (i.e., dues).	End of current year plus 4 years
Policies, Procedures, Guidelines, and Requirements	Policy, procedure, guideline or requirement documents for all departments affecting GHI/GDC operations, critical functions, etc. Includes general orders, standards, guidelines, forms, safety rules and regulations, best practices, etc.	Until repealed or revised, plus 4 years
Mail Services/File Printing Service Requests	Mail-related records such as service requests concerning business replies, express mail, and postage due. Records concerning requests for printing services.	While useful
General documents	Memoranda, forms, letters, reports, meeting minutes, compliance tips, etc.	3 years after obsolete
Vehicle Maintenance	Includes owner manuals and records regarding work completed on vehicles including but not limited to: requests for service, vehicle maintenance and repairs, smog test documentation, daily-usage logs, and incident reports.	Life of the vehicle plus 5 years
Subpoena	Subpoenas received from legal agencies.	3 years (store on secure server)
Standard Operating Procedure	Requirements, guidelines, policies/procedures for each division.	3 years after repeal or revision
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to General and Support Services. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
HAMILTON PLACE, GREENBELT, MARYLAND 20770
Area Code (301) 474-4161 Fax (301) 474-4006





GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Human Resources

Retention Category	Document Description	Retention Period
Benefit Plan Documents and Contracts	Contracts and agreements related to the provision of benefits to GHI/GDC employees. Included are contracts and agreements for medical, dental, vision, disability, and life insurance.	6 years after superseded
Direct Deposit	Includes payment registers, bank statements, backups, ACH authorization agreement, voided checks, etc.	6 years after audit
Equal Opportunity Records	Complaint records, investigation results, interviews, etc.	3 years after separation
Employee Handbook and Orientation Packets	Information distributed at employee orientation for newly hired employees	5 years after superseded
Employment Verifications	Includes documentation of personal loans, workers' compensation inquiries, state disability, child support, unemployment questionnaires, etc.	6 years after separation
INS Form I-9 (Employment Eligibility Verification Form)	Includes documents for hired employees such as form I-9 and attachments, copies of documents establishing identity and employment eligibility.	6 years after separation
Leaves of Absence under Family Medical Leave Act	Employee records pertaining to compliance with FMLA's leave requirements.	6 years after separation
Personnel File	Includes job applications and resumes of successful applicants, pre-employment medical evaluations, background information and fingerprints, W-4 forms, contracts, salary actions, wage rates, disciplinary actions, evaluations, personnel action forms, applications for leave (other than FMLA), Immigration Reform and Control Act forms, benefit forms, correspondence and reports related to employees, etc.	6 years after separation
Reasonable Accommodation (GHI/GDC Employees)	Includes documents used to determine reasonableness and nexus between the requested accommodation and disability.	6 years after application
Recruitment	Applications, resumes and materials submitted by unsuccessful prospective employees, including other records such as job postings, job classifications and other terms and conditions of GHI/GDC employment.	3 years after close of recruitment period or after decision
Training Records	Documentation of staff training, including certificates earned, sign-in sheets, and training materials. Does not include payment records maintained by the Finance Dept. or records required to be maintained to	3 years after separation

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006



	document compliance with federal or state statutes, regulations, or guidelines.	
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to Human Resources. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Information Technology

Retention Category	Document Description	Retention Period
User Access Records	User Access records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records indicating levels of access permitted to individual users and groups of users.	Until superseded or obsolete
Usage And Monitoring Records	Usage And Monitoring records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records documenting details and/or summaries of the use of computer resources including login files, system usage, and internet usage	Until superseded or obsolete
Help Desk Tickets and Responses	Records documenting requests for IT helpdesk, call center, and other services and the responses thereto, including but not limited to helpdesk tickets, request tracking information, communications, and descriptions/reports of services provided.	1 year
Backup Files	Backup files qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied.	Until superseded or obsolete
System And Data Documentation	System and Data Documentation qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records documenting systems and data including network configuration maps and plans, data dictionaries, flow charts, specifications, file layouts, source code, metadata, system change notices, and security records	Until superseded or obsolete
Software and Hardware Inventory Records	Software and Hardware Inventory records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. As such, these records may be disposed in an appropriate manner as soon as they are superseded or become obsolete. Includes running inventories of hardware and software used to track locations, to whom assigned, and licensing information	Until superseded or obsolete
Hardware and Software Documentation and Maintenance Records	Hardware and Software Documentation and Maintenance records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or	Until superseded or obsolete

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

	implied. Includes scope of work service level and maintenance agreements, licensing agreements, warranties and reference manuals, maintenance logs, and any other records documenting the operation and use of IT hardware and software.	
Design and Implementation Project Records	Design and Implementation Project records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal record keeping requirements, explicit or implied. Includes records created during the design and implementation of information technology systems and applications including but not limited to schedules, plans, tracking, analyses, proposals, draft documentation, evaluations and test results.	Until superseded or obsolete



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Maintenance/Technical Services/Homes Improvement

Document Category	Document/Record Description	Retention Period
Addendum	Documents signed by members added to the MOC addendum for addition maintenance/replacement of electronic thermostats, HVAC, etc.	Permanent
Bids and Proposals	Records related to successful, rejected, unopened, protests, or sealed bids and proposals. Includes correspondence related to fee for service, disputes, meeting minutes, agreements, appeals, etc.	Permanent, if accepted 1 year, if rejected
Claims (Insurance) Paid/Denied	Official records of liability claims filed by or against GHI/GDC or any of its instrumentalities or affiliates in connection with facilities operated by GHI/GDC until. Includes correspondence and settlement or repayment agreements.	5 years after the claim is resolved
Contracts – Services and Commodities	Contracts, requisition, reference forms, purchase order, bond and surety records, correspondence and related papers pertaining to contract award, administration and payments related to awards and contracts for services and commodities. Includes records reflecting the rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price. Does not include design, construction and development-related files.	Permanent
Development and Design Plans	Certificates of Occupancy, zoning documents, specifications, condemnation records, etc. Includes blueprints or any development plans related to GHI/GDC.	Permanent
Environmental Records	Negative declarations, environmental site assessments, environmental impact reports, statements of overriding consideration, etc.	5 years from the date after which the property has no affiliation or ownership by GHI/GDC or related entities
Inspection Reports and Remediation Actions	Property inspection reports and results, including inspection of lead-based paint/asbestos, presale inspection checklists/forms, seller certification, GHI Intent to Sell, addition certification, resale inspection requirements, and hazard reduction or remediation activities conducted.	Permanent
Inventory Files	Inventory reports, reconciliation, etc.	5 years after reconciled
Permits	Building permits, appraisals, property improvement records, etc.	Permanent
Purchasing File – General	Includes requisitions for purchase orders, blanket orders, encumbrance release orders and contract orders, credit card statements and records of card users.	5 years after final payment

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
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 Area Code (301) 474-4161 Fax (301) 474-4006

Real Property Lease and Rental Agreements	Includes original property lease or rental agreement/amendments and related correspondence, etc.	5 years after completion/cancellation of the lease agreement
Real Estate Acquisition and Disposition Records	Deeds of trust, grant deeds, title records/reports, purchase and sale agreement, site assessments, escrow instructions, appraisals, etc.	12 years in general files, then transferred to archives as a permanent record.
Surplus Equipment Disposal Records	Records including invitations, bids, acceptances, lists of materials, evidence of sales and related correspondence.	5 years after final payment
Surveys	Document signed by individual member indicating upgrade choices for unit.	1 year after close of HIP cohort
Vendor Files - Routine	Includes records regarding vendor applications (including contractors and sub-contractors), direct deposit application, voided check, W-9, vendor code, etc.	5 years after participation
Vendor Files - Major Projects	Includes records pertaining to insurance binders on major projects such as asbestos removal, drainage, and environmental projects.	PERMANENT
Work Orders	Maintenance work order requests	5 years after work order is closed
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to Maintenance, Technical Services, or Homes Improvement. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action

Transitory Records

Document Category	Document/Record Description	Retention Period
Activity Records	Records documenting routine activities (i.e. calendars, appointment books, schedules, logs, etc.)	While useful
Advertising Material	Solicited or unsolicited information received from businesses or individuals advertising their products or services (i.e. electronic brochures, company profiles, sales letters, etc.).	While useful
Correspondence (Routine)	Routine correspondence that requires no administrative action, policy decision, or special handling and is not subject to any specific legal requirements.	While useful
Drafts of Records	Preliminary or tentative versions of a record that do not form significant stages in the preparation of a final documents. Drafts that are legally required, acted upon, or applied must be retained according to their intended record type (i.e. policies, procedures, requirements, budgets, etc.) as listed elsewhere in the Record Retention Period.	While useful

Item 6b. Attachment #3a



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

Duplicates	Exact copies of documents where nothing has been added, changed, or deleted (i.e. photocopies of paper documents; copies of government brochures and pamphlets; duplicates of microfilm, CD-ROMs, DVDs, etc.)	While useful
External Publications	Books, magazines, periodicals, pamphlets, brochures, journals, newspapers, etc.	While useful
Notices and Memoranda (Routine)	Notices including memoranda and other records that do not serve as the basis of official actions and are routine in nature, such as those pertaining to meetings, holidays or special events circulated to all staff or posted in public folders.	While useful
Promotional and Public Relations Materials Prepared by or for GHI/GDC	Promotional and public relations materials (i.e. audiovisual items, photographs, flyers and brochures, newsletters, press releases, published reports, bulletins, etc.). Documents that do not contain significant information or substantial evidence of plans and directions for agency activities, or critical information that is not contained in other GHI/GDC records. Does not include Section 8 Owner Newsletters or Housing Services Resident Newsletters.	While useful. Please refer to promotional materials under the archives category.
Reference Materials (Outside Sources)	Sources of information that were intended primarily for consultation and, if used to prepare or update a formal or ongoing record, are cited as needed. Includes duplicate, informational, extra, unofficial, or informal copies of records that were kept only for convenience or quick reference.	While useful
Research, Notes and Working Files	Calculations, short informal notes such as phone messages and notes collected and used in the preparation of documents, written down for review, or as an aid to memory, or to inform someone else.	While useful
Requests	Requests and responses for forms, publications, records, and other agency information that, with the exception of redacting confidential and privileged information, do not require administration review before, or further action after, the form, publication, record, or other agency information is provided.	While useful
Temporary Information	Telephone messages, routing slips, self-adhesive notes, memos, notes, messages, mail service and printing service records that have only immediate or short-term value.	While useful
Worksheets	Forms, checklists and other worksheets used to prepare or update a formal or ongoing record or informally track workflow.	While useful



GREENBELT HOMES, INC.
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REVISED

Record Retention Policy

February 2019

Revised February 2021

Second Revision April 2021

Third Revision May 2021

Fourth and Final Revisions July 2021

Recommended Revisions February 2023



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HAMILTON PLACE GREENBELT, MARYLAND 20770
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Table of Contents

PURPOSE

.....3

RETENTION REQUIREMENTS 4

Disposing of Records 5

Security Safeguards 6

Compliance Oversight 6

RETENTION SCHEDULE 7

Board of Directors/Management Office 7

Member Services 8

Finance & Accounting Division 9

General & Support Services 11

Human Resources 12

Information Technology 13

Maintenance/Technical Services/Homes Improvement 14

Transitory Records 15



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4181 Fax (301) 474-4000

PURPOSE

The purpose of this Record Retention Policy is to specify the lengths of time that books and records of Greenbelt Homes Inc. (GHI) and Greenbelt Development Corporation (GDC), shall be kept and the procedures for disposing of such documents at the end of their retention periods. These books and records may be in paper format (e.g., documents, papers, letters, contracts, maps or books); electronic format e.g. tapes /discs, photographs, film or sound recordings, and data- or image-processed documents that are stored on computers.

Books and records are to be kept and managed in a consistent and organized manner, to comply with applicable legal and regulatory requirements, promote business efficiency, minimize expense for unnecessary storage, and to make it easier to locate records when needed.

The record retention periods specified in this policy are based on the need to keep records for historical reference; to satisfy contractual, legal or regulatory requirements; and for other purposes as set forth in this policy. GHI/GDC staff members must dispose of records that have satisfied their required period of retention and are no longer needed.

GHI/GDC expects all officers, directors, employees, contractors, volunteers and any other agents or representatives to follow the rules and procedures set forth in this policy document.

IMPORTANCE OF ARCHIVAL MATERIAL

GHI has possession of primary source materials important to the founding of the federal planned community and of the housing cooperative. Many of these records are original and unique copies that cannot be consulted elsewhere, including the Library of Congress and the National Archives. These records include a daily log of workers on the job, their worksites, and tasks; iterations of the Member Handbook over the history of the community; various newsletters and community communications that are likely to be found only in the mementos of residents; and numerous maps and plats.

Such records can never be replaced.

The GHI co-operative began as a planned community built by the Resettlement Administration, one of President Franklin D. Roosevelt’s New Deal initiatives intended to provide relief to those suffering from the economic downturns of the Great Depression. Rexford Guy Tugwell, an assistant Secretary of Agriculture and the first head of the RA, planned to build a series of *"cooperative communities where the built environment would reinforce community spirit and cooperation among its residents."* (Greenbelt Museum) Drawing inspiration from Ebenezer Howard’s green town model in England, Tugwell’s green towns would combine “the best aspects of a rural life: lakes, woods, and open spaces with the best aspects of an urban life: recreational facilities, theaters and shops” (Greenbelt Museum). Tugwell’s plans were controversial and potentially expensive, so only three green towns were actually constructed--Greendale, WI; Greenhills, OH; and Greenbelt, MD.

Of the three original green towns, Greenbelt is the most intact, due to the fact that the housing units - brick, block, and frame dwellings - were purchased from the federal government in 1952 by a co-operative group of residents. This cooperative, initially called the Greenbelt Veteran Housing Corporation, is now Greenbelt Homes, Inc.

The story of Greenbelt Homes, Inc. is central to the story of the unique city of Greenbelt. It has major achievements that include preserving the original structures, parks, and pathways of the planned community while also outfitting them for post-modern living. This stewardship of the original, historic fabric of the community, and the fostering of the cooperative spirit, has allowed the



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-8181 Fax (301) 474-4006

atmosphere and quality of life championed by Rexford Guy Tugwell and the RA to continue to survive and flourish.

Greenbelt has been the subject of more than 15 books, numerous articles, films, videos, documentaries, and numerous masters and doctoral thesis. It attracts visitors from all over the world for its significance to the history of planned communities; utopian experiments; the co-operative movement; the Great Depression and New Deal; and the history of landscaping, architecture, and mid-twentieth century material culture.

RETENTION REQUIREMENTS

Electronic records subject to these retention requirements include those records maintained on GHI/GDC computers and other electronic devices that are provided to employees for business use. However, if you use a personally owned device for GHI/GDC purposes, either on the organization's premises or elsewhere, any GHI/GDC business documents on the device are also subject to these retention requirements.

It is the content of the record that determines its retention period. For instance, an email can be a very significant correspondence with a 20 year retention period or a casual communication that can be deleted immediately. As set forth herein, GHI/GDC attempts to define retention periods based upon content type. To the extent the retention period is not clear; the document should be retained for not less than three years, and the General Manager or his/her designee must approve the deletion of the document.

As circumstances may dictate, the General Manager or his/her designee may issue a "legal hold," suspending the destruction or deletion of any records due to pending, threatened, or otherwise reasonably foreseeable litigation, audits, investigations, or similar proceedings. If and when GHI/GDC staff is informed of such a hold, any documents relevant to the matter must not be destroyed or deleted until the General Manager or his/her designee, after consultation with GHI legal counsel, removes the "legal hold." The "legal hold" directive must inform staff of the specific types of documents that must be retained for these purposes. If in doubt as to what is relevant, staff are required to seek clarification from the General Manager or his/her designee before destroying or deleting any document. The directive must also make clear the time period for which the documents must be retained. During that retention period, any document that may be relevant must not be destroyed or deleted without the **prior** written approval of the General Manager or his/her designee.

No officer, director, employee, contractor or volunteer of GHI/GDC shall knowingly destroy or delete a document with the intent to obstruct or influence any investigation or proper administration of any matter by any government department, court or agency. This requirement covers all records and documents of GHI/GDC.

Archival Records should be retained in perpetuity and **may NOT be destroyed** except in cases of severe damage due to fire, smoke, water, rodents, insects, mold, or extreme disintegration.

In all other circumstances, documents listed in the schedule below must be retained for the periods of time set forth on this schedule. Please note that the information listed in the schedule below is intended as a guideline and may not contain all records that may be required to be retained in the future.

Records exist in electronic, hard copy (paper) and other formats. The following are types of records:



1. **Transitory Records.** A transitory record is a record with short-term value and does not have to be kept for the full retention period. Examples of transitory records generally include:
 - a) preliminary drafts of letters, reports, pleadings, etc., after the final is prepared and the drafts are no longer useful;
 - b) duplicate copies of documents already on file, that have been retained only for convenience;
 - c) casual e-mail or written correspondence about scheduling or other matters that have no substantive significance;
 - d) routing slips, voice-mail, phone messages, miscellaneous notices or memoranda;
 - e) additional information copies of widely distributed materials or information received as part of a distribution list, list serves and other Internet distribution sources, solely for convenience of reference;
 - f) duplicate stocks of obsolete publications, pamphlets or blank forms; and
 - g) unsolicited advertising.

Notwithstanding the foregoing list, there may be instances where a particular otherwise “transitory record” may have important legal or other significance and should not be deleted or destroyed. The General Manager or his/her designee should be consulted about any such record before destruction or deletion.

2. **Electronic Records.** In general, GHI/GDC staff must store records in electronic form, rather than in paper format, on GHI’s document server.
3. **Archival Records.** These are records that a department has stored for the required retention period and no longer are in regular use, but may be of sufficient historical importance that they should be kept indefinitely or permanently.

Archives and Archival Records.

Archives refers to the specific location where *archival records* are preserved and made available to researchers of all types, including GHI staff.

Archival documents are the original documents and are considered primary sources, having been created at the time of the events they describe by participants or witnesses of those events. The format of these documents does not matter; they can be paper documents, maps, photographs or even digital files. Primary sources that exist only as a copy of the original should be given the same consideration.

Archival Records should be retained in perpetuity and may NOT be destroyed except in cases of severe damage due to fire, smoke, water, rodents, insects, mold, or extreme disintegration.

Disposing of Records

Transitory records must be deleted or disposed of when they have no further business value. Electronic non-transitory records must be disposed of at the end of their retention period. Records containing confidential or sensitive information must be shredded, permanently deleted or otherwise disposed of in a manner that ensures that the information may not be disclosed. Paper records that do not contain confidential or sensitive information may be recycled or simply discarded. When paper records (other than transitory records) are disposed of, each department is responsible for creating and maintaining a record showing the following:

- a) Type of record disposed;



- b) Method of disposal;
- c) Name of the supervisor authorizing the disposal; and
- d) Date of the disposal.

To remain in compliance with GHI/GDC requirements, GHI/GDC staff will:

- Maintain and enforce security procedures
- Keep records and monitor security issues
- Communicate security information and requirements to appropriate staff or IT providers, and coordinate and conduct security awareness training for staff
- Conduct quarterly review of User ID network passwords
- Report any evidence of unauthorized access or known security breaches

Security Safeguards

1. Only authorized staff will have access to the shared drives on company computers and other document repository systems or other computer software programs.
2. All users of the GHI/GDC systems will have a current signed User Agreement on file.
3. GHI/GDC will keep a record of all authorized users, including date access was granted and date access was revoked, if applicable.
4. All employees issued keys will complete a form acknowledging receipt. These employees will sign a log with their name, date of issue and date of return.
5. Work areas containing sensitive information will be shielded from the public.
6. Unauthorized staff or other unauthorized persons shall not be given access to work stations and computers of authorized persons.
7. GHI/GDC staff will not leave resident folders exposed on desk tops or computer screens open with sensitive data unattended.
8. GHI/GDC staff will never take any resident files home for any reason. If it is necessary to transport resident files between GHI/GDC offices, the files will be transported in a secure manner.
9. GHI/GDC staff must remove member/resident printouts from the printer immediately to ensure that nothing is inadvertently left vulnerable to unauthorized access.
10. Member/Resident credit, income, and other reports should be retained for the duration of the membership/tenancy, plus three years from the end of the membership/tenancy.
11. GHI/GDC staff will keep a log of all documents shredded, including name of employee disposing of document, description of document, method of disposal and date of disposal.
12. At the close of business each day, member/resident files (if applicable) will be locked in file cabinets and the file cabinet areas will be locked. In addition, member/resident and applicant information must not be accessible or visible to non-GHI/GDC staff or non-approved third party management.
13. GHI/GDC staff will review security procedures periodically to ensure compliance and safeguard against breaches.

Research and Storage of Archival Records

1. The GHI Archives shall be located in an appropriate location that enables the preservation and public access to all archival and archived materials in the collection. This location and access schedule should be chosen according to the proper archival standards.



GREENBELT HOMES, INC.
HAMILTON PLACE, GREENBELT, MARYLAND 20770
Area Code (301) 474-4151 Fax (301) 474-4006

2. All archival records shall be housed in the archives. Additional material culture (items such as architectural remnants, signage, and other materials original to the community) shall be identified in the retention schedule.
3. A finding guide shall be created for GHI's archival records.
4. GHI's archives and archival records shall be readily available for members, staff, and researchers to consult, browse, and research.
5. GHI archival records that are digitized shall NOT be destroyed but retained in long-term storage with proper climate control.
6. Ideally, in the future, GHI should employ a full-time archivist for the collection. This position could begin as a part-time position and grow in the future to serve an archivist/preservationist role for GHI.
7. If the cost and logistics of properly housing and preserving archival material becomes unduly burdensome, transferring the records to another repository may be considered. However, any corporate documents should not be transferred out of the holdings of the corporate office.

Care and Handling of Archival Records

1. Documents, photos, maps, plats, etc. that are very brittle or otherwise very fragile may NOT be digitized.
2. Sheets of paper including maps and plats should be stored flat in acid free file folders in acid free boxes or cabinets.
3. Sheets of paper that are brittle or otherwise fragile should be stored in mylar sleeves.
4. All photographs must be stored in mylar sleeves.
5. Documents in binders must be re-housed in acid-free binders or files or boxes.
6. All staples, metal paper clips, and brads must be removed and replaced with plastic fasteners.

For more information on how historic preservation can benefit the cooperative community, consult the report submitted by the GHI Ad Hoc Task Force on Historic Preservation. That report can be requested by visiting Member Services.

Compliance Oversight

The General Manager is responsible for enforcement of this requirement. Please direct any questions regarding the retention of documents not listed in this schedule to the General Manager.

Please note that failure to follow this requirement can result in possible civil and criminal sanctions against GHI/GDC and its officers, directors and employees, and possible disciplinary action against responsible individuals, up to and including termination of employment.



GREENBELT HOMES, INC.
 HAMILTON PLACE GREENBELT, MARYLAND 20770
 Area Code (301) 474-4361 Fax (301) 474-4074

RETENTION SCHEDULE

Archival Documents and Materials

Document Category	Document/Record Description	Retention Period
<p>Any and all materials that are dated or can be dated prior to 1953 - the year that the community passed from federal ownership to cooperative ownership - are automatically considered archival records and as such shall be preserved and protected in the GHI Archives for use by GHI members, staff, and interested members of the general public. They shall be preserved in their original condition even if the material is transferred into a digital format.</p> <p>The list of organizations, entities, and corporations associated with Greenbelt Homes, Inc. includes but is not limited to: Greenbelt Mutual Housing Association (1946) Greenbelt Mutual Home Ownership Corporation (1947-49) Greenbelt Veteran Housing Corporation (1949 - 1957) Greenbelt Development Corporation Greenbelt Land Improvement Corporation Share Servicing Loan Corporation Greenbelt Homes, Inc. Development Corporation (for 1979 rehab)</p>		
Planning and Construction documents ca. 1935 to 1939	Any documents concerning the planning and construction of the original planned community, including residential, commercial, and industrial structures. Documents dated prior to January 28, 1936 may include the title "Berwyn Project" or "Beltsville Project". These include daily progress reports, material invoices, correspondence, and other printed material, and cartographic and photographic media.	Permanent
Planning and Construction documents ca. 1940 - 1945	Any documents concerning the planning and construction of the defense home community, including residential, commercial, and industrial structures. These include daily progress reports, material invoices, correspondence, and other printed material, and cartographic and photographic media.	Permanent
Approved Board Minutes and Agendas dated before 1953	Approved official minutes and agendas of open and closed meetings of the Board of Directors of Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above. The board recommends that these documents be scanned and kept in one repository with all minutes.	Permanent
Photographs	All photographs related to the planning and construction of Greenbelt. Includes any and all original photographs of community and/or member activities and events of any date. Includes any and all original photographs	Permanent



GREENBELT HOMES, INC.
 HAMILTON PLACE GREENBELT, MARYLAND 20770
 Area Code (301) 474-4181 Fax (301) 474-4096

	<p>of residences and other structures original to the planned community, the defense community, or structures built by the cooperative.</p> <p>All photos must be assessed and curated prior to disposal decision.</p>	
Maps and Plats	Any original copies of maps and plats concerning the planning and construction of Greenbelt. This includes any and all maps and plats that are undatable and any and all that are datable prior to 2000.	Permanent
Tenant and Member Handbooks	This includes copies of the federal tenant handbook (ca. 1937 to 1953) and the cooperative member handbook (ca. 1953 to present).	Permanent
Visitor Correspondance	This includes any and all correspondence with visitors, including visitor logs from the community's early years (ca. 1937 - 1941).	Permanent
Architectural Fragments and Signage	Architectural fragments are considered character-defining features of the buildings and deserve to be preserved as carefully as the archival records. Other bits of material culture from Greenbelt's history, such as signs, should be given equal consideration.	Permanent

Materials for Archives

<p>The following materials shall be included in the archives as a record of the history of the community as a cooperative following the 1953 sale by the federal government. These materials shall be accessible to GHI members, staff, and interested parties of the general public. Best practices dictate that these materials should be digitized for research purposes and the original medium - though not of primary concern - be preserved as best as possible. These records should not be transferred from the corporate office.</p>		
Approved Board Minutes and Agendas **1953 to 2000** **2000 to 2030**	<p>This includes approved official minutes and agendas of open and closed meetings of the Board of Directors of Greenbelt Homes, Inc. and Greenbelt Development Corporation (GDC) and any subsidiaries.</p> <p>Approved minutes, agendas, and reports for GHI committees, subcommittees, and task force meetings and projects.</p>	Permanent
Annual Meeting Minutes, Agendas, and Reports	This includes approved minutes, agendas, agenda packets, and other materials related to the annual membership meeting of Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above.	Permanent
Articles of Incorporation and Dissolution	Including any incorporation and/or dissolution documentation, and any amendments thereto, of GHI and any other subsidiaries or corporations which GHI has owned or been a part of.	Permanent



GREENBELT HOMES, INC.
 HAMILTON PLACE GREENBELT, MARYLAND 20770
 Voice Office (301) 474-4161 Fax (301) 474-4006

Bylaws	This includes approved bylaws and any amendments thereto of Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above.	Permanent
Certification of Election Results	This includes any documents detailing the total number of votes cast and the total vote tally for each individual candidate during membership meetings.	Permanent
Stock Ledgers	This includes stock ledgers and any associated materials for Greenbelt Homes, Incorporated (GHI) to include the organizations referenced above.	Permanent
Mutual Ownership Contracts	Since the terms, conditions, and language of the contracts have varied over the years, care should be taken to document and catalogue a sample of the contracts over the years, taking care to redact any sensitive information in these contracts.	Permanent but not kept in Archives.
Audited Financial Statements	These records are important for understanding fee trends that affect the entire membership.	Permanent but not kept in Archives.
Land Records	These records are valuable resources for both historic and institutional research and include: <ul style="list-style-type: none"> • Mortgage Records • Deed Transactions 	Permanent but not kept in Archives.
Member Relations	This includes material relating to the corporation's interaction with the membership, including: <ul style="list-style-type: none"> • community or member relations newsletters and publications • marketing materials such as posters, flyers, and brochures • membership rolls • member referendum records • member petitions • demographic studies • electronic newsletters, including E-News. 	Permanent
Commemorative Materials	This includes any and all materials relating to celebrations and commemorations of milestone anniversaries, such as (but not limited to) 5-yearly anniversaries of the construction of the community in 1937.	Permanent
Single-Family Home Construction	Documents relating to the deliberation, building, financing, and management of single-family homes.	Permanent
Cooperative Endeavors	Publications and other materials detailing GHI's participation in the national and international cooperative movement.	Permanent
GHI Rehabilitation Project ca. 1979 - 1984	Includes documents, correspondence, photographs, and other primary source	Permanent



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4006

	material related to the GHI Rehab Program.	
GHI Homes Improvement Program (HIP) ca. 2016 - 2021	Includes documents, correspondence, photographs, and other primary source material related to the GHI Homes Improvement Project.	Permanent
Replacement Reserves Studies Replacement Reserve Studies for Additions	Documents from professionally prepared studies of the replacement reserves and provide details including the structure of member fees. These studies provide important knowledge-based documents for staff and researchers.	Keep but not in archives
Partnerships and Projects with Federal/County/City Governments/Educational Institutions	These documents include efforts to make GHI more racially economically and ethnically diverse and would be useful to researchers and members.	Keep but not in archives

Management Office

Document Category	Document/Record Description	Retention Period
Approved Board Resolutions	Formal statements of decisions made by the Board of Directors of GHI and GDC.	Permanent
Approved Board Meeting Minutes	Approved official minutes of open and closed meetings of the Board of Directors of GHI and GDC.	Permanent
Board Agenda Materials	Includes regular and special meeting agendas, Board reports, committee packets, manager's memorandum, and records distributed or otherwise submitted into the record during a regular or special meeting.	Permanent
Board Files	Files containing information on former Board members, articles of dissolution, etc.	Permanent
Maryland Local Government Tort Claims (LGTC) Notices	Court documents/records related to injury or other matters covered under Maryland Tort claims.	4 years (except for a claim involving a minor, which is 21 years)
Memoranda of Understanding (MOU)	MOU or Agreement between GHI/GDC and any federal, state or governmental entity or non-profit corporation. General Counsel will determine if other retention period is necessary.	10 years from the termination of the agreement
Records Retention and Disposition Files	Records documenting the destruction of damaged records that could not be recovered, inventories, disposal requests and authorizations, schedules and reports, etc.	Permanent
Public Meeting Notices	Board public/special meeting notices, including proof of posting and/or publication.	5 years
Recordings of Open Session Meetings	Video and audio tape recordings of meetings.	Until minutes of the meeting are approved.
Strategic Plans	Annual Strategic Plan and 5-Year Plan Public notices (including posted and published notices); materials presented at public meetings; agendas, reports and minutes of meetings at which the plan is considered and/or approved, and executed copies of any adopted resolutions related to the Plan. Also includes originals of the written comments received from the membership concerning the Plan and copies of any GHI/GDC correspondence responding to the same.	5 years for Annual plan; 15 years for Five-Year Plan



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT MARYLAND 20770
 Area Code (301) 474-4161 Fax (301) 474-4076

Member Services

<u>Document Category</u>	<u>Document/Record Description</u>	<u>Retention Period</u>
Complaint matters	Records related to member complaints, lease violations, investigation activities, correspondence, supporting documentation, etc.	5 years after closure of the complaint.
Reasonable Accommodation Requests	Reasonable Accommodation Request form, interpreter requests, letters/notes, appeals, salary etc.	5 years after determination or action. Immediately shred records containing medically sensitive information following determination or store on secure server (unless appealed, then destroy after appeal decision).
Waitlist Applications for GDC Parkway Apts.	Includes documentation of the activities involved in the preparation, maintenance and publication of the certified waiting list.	5 years
Complaint Panel/Informal and Formal Hearing Records	Includes audio recordings, recommendations, and records of any panel or hearing, copies of all documents, records, requests, and exhibits submitted for the panel/hearing, Board's written decision, and notices/correspondence regarding the outcome.	5 years after decision
Criminal Background Check Results	Includes results from database criminal history record information and fingerprint checks.	Shred immediately (If appealed, shred upon completion of hearing or due process)
Investigation Case Files	Member Services complaint investigation records including, photographs findings, includes original documents such as correspondence, notices, materials from formal and informal hearings and investigative reports, etc.	5 years after agency action or final judgment
Member Services/ GDC Parkway Apt. File Records	Includes mediation agreements, participation forms, non-transitory correspondence (including letters of information or corrective action), substantive legal notices (including rent adjustments), reports, notes and other materials documenting interactions with member/resident, inspection records, etc.	5 years after move out participation ends
RV/Boat Lot and Storage Files	Boat lot and storage leases, supporting documentation, forms, etc.	5 years after lease ends
Transfer Waiting List Activity File re: GDC Parkway Apts.	Documentation of transfer requests for administrative, emergency, or reasonable accommodation including outreach activities, intake and processing of applications, notices, and other activities related to offering units, etc.	5 years after participation ends
Vacated Resident – Debt Owning Files re: GDC Parkway Apts.	Retain records concerning debts owed or termination of assistance until the debt is paid in full.	12 years after end of participation
Vacated Resident– Do Not Re-Admit re: GDC Parkway Apts.	Permanently retain documentation used to substantiate fraudulent misreporting of income.	Permanent
Vacated Resident – Good Standing re: Parkway Apts.	Retain files of participants who vacated the premises without owing money and are in good standing.	5 years after participation ends
Vacated Resident - Accounts Receivable (Debt Collection) re: Parkway Apts.	Includes record copies of court judgment, judgment liens and/or tax intercept records, copies of records documenting the receipt of payments made in satisfaction of the judgment, and copies of applicable repayment or settlement agreements. Includes financial statements and bank deposit statements related to moneys owed by participants/residents. Requires periodic review.	Retain until the end of the 12-year judgment period plus an additional 10 years or when judgment is satisfied plus 12 years, whichever occurs first



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
 Area Code: (301) 474-4151 Fax: (301) 474-4005

Finance & Accounting Department

Retention Category	Document Description	Retention Period
Accounts Payable	Supporting documentation on accounts paid by GHI/GDC, such as vendor pay packages, purchasing cards, out-of-town travel and wire transfers. Files also include general ledger interface reports, check run reports and transmission, cash receipts, etc.	5 years after audit
Accounts Receivable	Documentation related to receivable records such as invoices, ledgers, schedules, checks, money orders (remote deposit) etc.	5 years after audit
Audit	Includes the following records: approved accounts analysis packets, staff working papers, audit related correspondence and GHI/GDC responses to questions arising during the process. Financial audit report, auditor's management letter, and responses to the auditor's management letter.	Permanent
Bond Accounting/Cash Management File	(a) For records pertaining to general obligation bonds (b) All other records including cash management investment tickets that contain details of investment transactions such as purchase of investment pools, certificates of deposit, bonds, commercial papers, repurchase agreements, or other securities.	(a) 12 years (from end of fiscal year) (b) 5 years
Budgets	Staff reports and back-up documentation, including department budget submissions, worksheets/analysis, adjustments, and salary surveys.	Permanent
Cash/Financial Management	Petty Cash reconciliation, deposit records, wire transfer documents, checks, returned deposit items, GHI/GDC bank statements/activity logs, stop payments, etc.	5 years after audit
General Accounting	Records including approved general ledger account reconciliation, fluctuation analysis, source data, monthly electronic confirmation, bank statements, bank activities and transactions reports, approved bank reconciliation and related schedules, documentation supporting adjustment, monthly statements of reserve accounts held by various trustees, copies of checks received by GHI/GDC, deposit tickets, journal entries pertaining to loan receipts, various income streams, grants, electronic banking activities.	Permanent
Debt Collection	Includes records of court judgment, judgment liens and/or tax intercept records, receipt of payments made in satisfaction of the judgment, and copies of applicable repayment or settlement agreements. Should have periodic reviews during the retention period.	12 years after judgment is satisfied or 12 years after judgment renewal
Payroll Accounting Records	Employee files containing payroll documentation, including address, dates of birth, occupation, compensation, hire and termination dates. Also includes individual contracts; wage/hour notices; records of additions to or deductions from wages, including documentation of payments by GHI/GDC on behalf of employees for taxes, benefit plans, the employee retirement data and other deductions; deduction authorization; beneficiary designations, unemployment claims, tax levies, withholding orders and garnishments and W-2 forms.	6 years after audit
Payroll Rate and Time Records	Includes time cards and records that document actual hours worked by employees and amounts of leave taken. Includes leave accrual and usage records; authorization for extra hours, overtime documentation.	6 years after audit
Payroll Registers	Electronic files documenting benefits, payroll, and other payments to or on behalf of employees.	6 years after audit
Purchasing	Includes requisitions for purchase orders, blanket orders, encumbrance release orders and contract orders, credit card statements and records of card users.	5 years after final payment



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 HAMILTON PLACE GREENBELT, MARYLAND 20770
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Repayment/Settlement Agreements	Records related to repayment and settlement agreement such as signed repayment agreement payments received, judgment, lien or tax intercept records, etc.	12 years after term of agreement ends
Tax Records	Tax returns with any related and/or supporting documentation including registration renewals and statements of information for various entities, 1099 reports for owners and vendors, IRS Annual Return of Withheld Federal Income Tax (Form 945), IRS Application for Tax Exempt Status, determination letters, annual returns, etc.	7 years after audit
Parkway Resident Accounting	Documentation related to resident accounts receivable and ledger records such as invoices, ledgers, cash receipts (rent and security/sure deposits), security deposit records (including refunds), etc.	5 years after audit
Expense Records	Reports completed by employees to reconcile various expenses, including travel.	5 years
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to Finance and Accounting. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action



GREENBELT HOMES, INC.
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General & Support Services

<u>Retention Category</u>	<u>Document Description</u>	<u>Retention Period</u>
Audit Records (Departmental)	Retain departmental budget background records accumulated in the preparation of annual budget estimates until covered by the budget. Does not include official audit records for which the Finance Department is the Department of Record.	4 years after the close of the fiscal year
Vehicle Title and Registration Records	Warranty documents, Department of Motor Vehicle title and registration records.	Life of vehicle plus 4 years
Equipment Records	Includes original operating instruction booklets, service agreements, warranty information, replacement part information, technical reference booklets, purchasing information, and owners' manuals which document the use and maintenance of equipment purchased by the department.	Life of equipment plus 4 years
Legal Advertising	Includes published or posted legal notices, original proofs of publications and other legal publications.	5 Years after publication
Membership Records	Includes records in support of GHI/GDC's payment of membership of staff in professional organizations (i.e., dues).	End of current year plus 4 years
Policies, Procedures, Guidelines, and Requirements	Policy, procedure, guideline or requirement documents for all departments affecting GHI/GDC operations, critical functions, etc. Includes general orders, standards, guidelines, forms, safety rules and regulations, best practices, etc.	Until repealed or revised, plus 4 years
Mail Services/File Printing Service Requests	Mail-related records such as service requests concerning business replies, express mail, and postage due. Records concerning requests for printing services.	While useful
General documents	Memoranda, forms, letters, reports, meeting minutes, compliance tips, etc.	3 years after obsolete
Vehicle Maintenance	Includes owner manuals and records regarding work completed on vehicles including but not limited to: requests for service, vehicle maintenance and repairs, smog test documentation, daily-usage logs, and incident reports.	Life of the vehicle plus 5 years
Subpoena	Subpoenas received from legal agencies.	3 years (store on secure server)
Standard Operating Procedure	Requirements, guidelines, policies/procedures for each division.	3 years after repeal or revision
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to General and Support Services. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action



GREENBELT HOMES, INC.
 HAMILTON PLACE, GREENBELT, MARYLAND 20770
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Human Resources

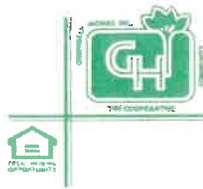
<u>Retention Category</u>	<u>Document Description</u>	<u>Retention Period</u>
Benefit Plan Documents and Contracts	Contracts and agreements related to the provision of benefits to GHI/GDC employees. Included are contracts and agreements for medical, dental, vision, disability, and life insurance.	6 years after superseded
Direct Deposit	Includes payment registers, bank statements, backups, ACH authorization agreement, voided checks, etc.	6 years after audit
Equal Opportunity Records	Complaint records, investigation results, interviews, etc.	3 years after separation
Employee Handbook and Orientation Packets	Information distributed at employee orientation for newly hired employees	5 years after superseded
Employment Verifications	Includes documentation of personal loans, workers' compensation inquiries, state disability, child support, unemployment questionnaires, etc.	6 years after separation
INS Form I-9 (Employment Eligibility Verification Form)	Includes documents for hired employees such as form I-9 and attachments, copies of documents establishing identity and employment eligibility.	6 years after separation
Leaves of Absence under Family Medical Leave Act	Employee records pertaining to compliance with FMLA's leave requirements.	6 years after separation
Personnel File	Includes job applications and resumes of successful applicants, pre-employment medical evaluations, background information and fingerprints, W-4 forms, contracts, salary actions, wage rates, disciplinary actions, evaluations, personnel action forms, applications for leave (other than FMLA), Immigration Reform and Control Act forms, benefit forms, correspondence and reports related to employees, etc.	6 years after separation
Reasonable Accommodation (GHI/GDC Employees)	Includes documents used to determine reasonableness and nexus between the requested accommodation and disability.	6 years after application
Recruitment	Applications, resumes and materials submitted by unsuccessful prospective employees, including other records such as job postings, job classifications and other terms and conditions of GHI/GDC employment.	3 years after close of recruitment period or after decision
Training Records	Documentation of staff training, including certificates earned, sign-in sheets, and training materials. Does not include payment records maintained by the Finance Dept. or records required to be maintained to document compliance with federal or state statutes, regulations, or guidelines.	3 years after separation
Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to Human Resources. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action



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Information Technology

Retention Category	Document Description	Retention Period
User Access Records	User Access records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records indicating levels of access permitted to individual users and groups of users.	Until superseded or obsolete
Usage And Monitoring Records	Usage And Monitoring records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records documenting details and/or summaries of the use of computer resources including login files, system usage, and internet usage	Until superseded or obsolete
Help Desk Tickets and Responses	Records documenting requests for IT helpdesk, call center, and other services and the responses thereto, including but not limited to helpdesk tickets, request tracking information, communications, and descriptions/reports of services provided.	1 year
Backup Files	Backup files qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied.	Until superseded or obsolete
System And Data Documentation	System and Data Documentation qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records documenting systems and data including network configuration maps and plans, data dictionaries, flow charts, specifications, file layouts, source code, metadata, system change notices, and security records	Until superseded or obsolete
Software and Hardware Inventory Records	Software and Hardware Inventory records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. As such, these records may be disposed in an appropriate manner as soon as they are superseded or become obsolete. Includes running inventories of hardware and software used to track locations, to whom assigned, and licensing information	Until superseded or obsolete
Hardware and Software Documentation and Maintenance Records	Hardware and Software Documentation and Maintenance records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes scope of work service level and maintenance agreements, licensing agreements, warranties and reference manuals, maintenance logs, and any other records documenting the operation and use of IT hardware and software.	Until superseded or obsolete
Design and Implementation Project Records	Design and Implementation Project records qualify as Transitory records that have very short-lived business, financial, legal, research or archival value and are not subject to any legal recordkeeping requirements, explicit or implied. Includes records created during the design and implementation of information technology systems and applications including but not limited to schedules, plans, tracking, analyses, proposals, draft documentation, evaluations and test results.	Until superseded or obsolete



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Maintenance/Technical Services/Homes Improvement

Document Category	Document/Record Description	Retention Period
Addendum	Documents signed by members added to the MOC addendum for addition maintenance/replacement of electronic thermostats, HVAC, etc.	Permanent
Bids and Proposals	Records related to successful, rejected, unopened, protests, or sealed bids and proposals. Includes correspondence related to fee for service, disputes, meeting minutes, agreements, appeals, etc.	Permanent, if accepted 1 year, if rejected
Claims (Insurance) Paid/Denied	Official records of liability claims filed by or against GHI/GDC or any of its instrumentalities or affiliates in connection with facilities operated by GHI/GDC until. Includes correspondence and settlement or repayment agreements.	5 years after the claim is resolved
Contracts – Services and Commodities	Contracts, requisition, reference forms, purchase order, bond and surety records, correspondence and related papers pertaining to contract award, administration and payments related to awards and contracts for services and commodities. Includes records reflecting the rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price. Does not include design, construction and development-related files.	Permanent
Development and Design Plans	Certificates of Occupancy, zoning documents, specifications, condemnation records, etc. Includes blueprints or any development plans related to GHI/GDC.	Permanent
Environmental Records	Negative declarations, environmental site assessments, environmental impact reports, statements of overriding consideration, etc.	5 years from the date after which the property has no affiliation or ownership by GHI/GDC or related entities
Inspection Reports and Remediation Actions	Property inspection reports and results, including inspection of lead-based paint/asbestos, presale inspection checklists/forms, seller certification, GHI Intent to Sell, addition certification, resale inspection requirements, and hazard reduction or remediation activities conducted.	Permanent
Inventory Files	Inventory reports, reconciliation, etc.	5 years after reconciled
Permits	Building permits, appraisals, property improvement records, etc.	Permanent
Purchasing File – General	Includes requisitions for purchase orders, blanket orders, encumbrance release orders and contract orders, credit card statements and records of card users.	5 years after final payment
Real Property Lease and Rental Agreements	Includes original property lease or rental agreement/amendments and related correspondence, etc.	5 years after completion/cancellation of the lease agreement
Real Estate Acquisition and Disposition Records	Deeds of trust, grant deeds, title records/reports, purchase and sale agreement, site assessments, escrow instructions, appraisals, etc.	12 years in general files, then transferred to archives as a permanent record.
Surplus Equipment Disposal Records	Records including invitations, bids, acceptances, lists of materials, evidence of sales and related correspondence.	5 years after final payment
Surveys	Document signed by individual member indicating upgrade choices for unit.	1 year after close of HIP cohort
Vendor Files - Routine	Includes records regarding vendor applications (including contractors and sub-contractors), direct deposit application, voided check, W-9, vendor code, etc.	5 years after participation
Vendor Files - Major Projects	Includes records pertaining to insurance binders on major projects such as asbestos removal, drainage, and environmental projects.	PERMANENT
Work Orders	Maintenance work order requests	5 years after work order is closed



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Miscellaneous	Contact your supervisor regarding any miscellaneous documents related to Maintenance, Technical Services, or Homes Improvement. All other unidentified documents are subject to the miscellaneous retention period.	5 years after last action
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Transitory Records

<u>Document Category</u>	<u>Document/Record Description</u>	<u>Retention Period</u>
Activity Records	Records documenting routine activities (i.e. calendars, appointment books, schedules, logs, etc.)	While useful
Advertising Material	Solicited or unsolicited information received from businesses or individuals advertising their products or services (i.e. electronic brochures, company profiles, sales letters, etc.).	While useful
Correspondence (Routine)	Routine correspondence that requires no administrative action, policy decision, or special handling and is not subject to any specific legal requirements.	While useful
Drafts of Records	Preliminary or tentative versions of a record that do not form significant stages in the preparation of a final documents. Drafts that are legally required, acted upon, or applied must be retained according to their intended record type (i.e. policies, procedures, requirements, budgets, etc.) as listed elsewhere in the Record Retention Period.	While useful
Duplicates	Exact copies of documents where nothing has been added, changed, or deleted (i.e. photocopies of paper documents; copies of government brochures and pamphlets; duplicates of microfilm, CD-ROMs, DVDs, etc.)	While useful
External Publications	Books, magazines, periodicals, pamphlets, brochures, journals, newspapers, etc.	While useful
Notices and Memoranda (Routine)	Notices including memoranda and other records that do not serve as the basis of official actions and are routine in nature, such as those pertaining to meetings, holidays or special events circulated to all staff or posted in public folders.	While useful
Promotional and Public Relations Materials Prepared by or for GHI/GDC	Promotional and public relations materials (i.e. audiovisual items, photographs, flyers and brochures, newsletters, press releases, published reports, bulletins, etc.). Documents that do not contain significant information or substantial evidence of plans and directions for agency activities, or critical information that is not contained in other GHI/GDC records. Does not include Section 8 Owner Newsletters or Housing Services Resident Newsletters.	While useful. Please refer to promotional materials under the archives category.
Reference Materials (Outside Sources)	Sources of information that were intended primarily for consultation and, if used to prepare or update a formal or ongoing record, are cited as needed. Includes duplicate, informational, extra, unofficial, or informal copies of records that were kept only for convenience or quick reference.	While useful
Research, Notes and Working Files	Calculations, short informal notes such as phone messages and notes collected and used in the preparation of documents, written down for review, or as an aid to memory, or to inform someone else.	While useful
Requests	Requests and responses for forms, publications, records, and other agency information that, with the exception of redacting confidential and privileged information, do not require administration review before, or further action after, the form, publication, record, or other agency information is provided.	While useful
Temporary Information	Telephone messages, routing slips, self-adhesive notes, memos, notes, messages, mail service and printing service records that have only immediate or short-term value.	While useful
Worksheets	Forms, checklists and other worksheets used to prepare or update a formal or ongoing record or informally track workflow.	While useful



GREENBELT HOMES, INC.
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Greenbelt Homes, Inc.						
2022 Pay Scales Adjusted with 5.60% Increase						
MAINTENANCE						
Grade	Job Title	Minimum	Midpoint	Maximum	Max with 5.60% Adj	Max with 5.60% Adj
A	Temp Summer Help /Grounds Worker I	\$ 25,473.76	\$ 31,842.72	\$ 38,311.68	\$ 33,625.91	\$ 40,457.13
		\$ 12.25	\$ 15.31	\$ 18.37	\$ 16.17	\$ 19.40
B	Carpenter Apprentice	\$ 29,295.76	\$ 36,619.44	\$ 43,943.12	\$ 38,670.13	\$ 46,403.93
		\$ 14.08	\$ 17.61	\$ 21.12	\$ 18.60	\$ 22.30
C	Electrical Apprentice I	\$ 33,389.76	\$ 42,111.68	\$ 50,534.64	\$ 44,469.93	\$ 53,364.58
	Grounds Worker II	\$ 16.19	\$ 20.25	\$ 24.29	\$ 21.38	\$ 25.65
	General Maintenance Worker I					
D	Carpenter I	\$ 38,743.12	\$ 48,428.64	\$ 58,115.20	\$ 51,140.64	\$ 61,369.65
	Electrical Apprentice II	\$ 18.63	\$ 23.29	\$ 27.94	\$ 24.59	\$ 29.50
	Purchasing Inventory Clerk					
	Plumber Apprentice I					
E	Carpenter II	\$ 44,554.64	\$ 55,693.04	\$ 66,831.44	\$ 58,811.85	\$ 70,574.00
	Electrical Community Beautification Inspector	\$ 21.42	\$ 26.78	\$ 32.13	\$ 28.28	\$ 33.93
	Projects					
	Plumber Apprentice II					
F	Mechanic/Special Projects Asst	\$ 51,237.68	\$ 64,047.36	\$ 76,857.04	\$ 67,634.01	\$ 81,161.03
	Carpenter III	\$ 27.76	\$ 30.79	\$ 36.95	\$ 32.51	\$ 39.02
	Electrical Journeyman					
	Plumber Journeyman					
G	Contracts/fee for Service Coordinator	\$ 58,923.28	\$ 73,654.88	\$ 88,385.44	\$ 77,779.55	\$ 93,335.02
	Inspector (Resales)	\$ 28.33	\$ 35.41	\$ 42.49	\$ 37.39	\$ 44.87
	Master Electrician					
	Master Plumber					

ADMINISTRATIVE		Minimum	Min with 5.60% Adj.	Midpoint	Mid with 5.60% Adj.	Maximum	Max with 5.60 Adj
Grade	Job Title						
A	On-Call Assistants Receptionist	\$ 30,864.08 \$ 14.84	\$ 32,592.47 \$ 15.67	\$ 38,579.84 \$ 18.54	\$ 40,740.31 \$ 19.58	\$ 46,295.60 \$ 22.26	\$ 48,888.15 \$ 23.51
B	Accounting Clerk Secretaries Technical Assistants (HR Asst)	\$ 34,876.40 \$ 16.76	\$ 36,829.48 \$ 17.70	\$ 43,594.72 \$ 20.96	\$ 46,036.02 \$ 22.13	\$ 52,314.08 \$ 25.15	\$ 55,243.67 \$ 26.56
C	Bookkeeper Administrative Assistant	\$ 39,409.76 \$ 18.95	\$ 41,616.71 \$ 20.01	\$ 49,262.72 \$ 23.68	\$ 52,021.43 \$ 25.01	\$ 59,114.64 \$ 28.42	\$ 62,425.06 \$ 30.01
D	Executive Assistant Contract Processing Specialist Leasing Coordinator/Network Administrator	\$ 49,262.72 \$ 23.68	\$ 52,021.43 \$ 25.01	\$ 61,578.40 \$ 29.61	\$ 65,026.79 \$ 31.27	\$ 73,894.08 \$ 35.53	\$ 78,032.15 \$ 37.52
E	Accounting Manager Project Manager Maintenance Manager	\$ 61,578.40 \$ 29.61	\$ 65,026.79 \$ 31.27	\$ 76,972.48 \$ 37.00	\$ 81,282.94 \$ 39.07	\$ 92,367.60 \$ 44.41	\$ 97,540.19 \$ 46.90
F	Director of Human Resources Director of Member Services	\$ 76,972.48 \$ 37.00	\$ 81,282.94 \$ 39.07	\$ 96,215.60 \$ 46.26	\$ 101,603.67 \$ 48.85	\$ 115,458.72 \$ 55.50	\$ 121,924.41 \$ 58.61
G	Director of Technical Services Director of Homes Improvement Program Director of Maintenance Operations	\$ 92,367.60 \$ 44.41	\$ 97,540.19 \$ 46.90	\$ 115,458.72 \$ 55.50	\$ 121,924.41 \$ 58.61	\$ 138,550.88 \$ 66.61	\$ 146,309.73 \$ 70.34
H	Director of Finance Assistant General Manager	\$ 110,841.12 \$ 53.29	\$ 117,048.22 \$ 56.27	\$ 138,550.88 \$ 66.61	\$ 146,309.73 \$ 70.34	\$ 166,261.68 \$ 79.93	\$ 175,572.33 \$ 84.41

Greenbelt Homes, Inc.						
2022 Pay Scales Adjusted with 4.30% Increase						
MAINTENANCE						
Grade	Job Title	Minimum	Min with 4.30% Adj.	Midpoint	Mid with 4.30% Adj.	Maximum
A	Temp Summer Help /Grounds Worker I	\$ 25,473.76	\$ 26,569.13	\$ 31,842.72	\$ 33,211.96	\$ 38,311.68
		\$ 12.25	\$ 12.78	\$ 15.31	\$ 15.97	\$ 18.37
B	Carpenter Apprentice	\$ 29,295.76	\$ 30,555.48	\$ 36,619.44	\$ 38,194.08	\$ 43,943.12
		\$ 14.08	\$ 14.69	\$ 17.61	\$ 18.37	\$ 21.12
C	Electrical Apprentice I	\$ 33,389.76	\$ 34,825.52	\$ 42,111.68	\$ 43,922.48	\$ 50,534.64
	Grounds Worker II	\$ 16.19	\$ 16.89	\$ 20.25	\$ 21.12	\$ 24.29
	General Maintenance Worker I					
D	Carpenter I	\$ 38,743.12	\$ 40,409.07	\$ 48,428.64	\$ 50,511.07	\$ 58,115.20
	Electrical Apprentice II	\$ 18.63	\$ 19.43	\$ 23.29	\$ 24.29	\$ 27.94
	Purchasing Inventory Clerk					
	Plumber Apprentice I					
E	Carpenter II	\$ 44,554.64	\$ 46,470.49	\$ 55,693.04	\$ 58,087.84	\$ 66,831.44
	Electrical Community Beautification Inspector	\$ 21.42	\$ 22.34	\$ 26.78	\$ 27.93	\$ 32.13
	Projects					
	Plumber Apprentice II					
F	Mechanic/Special Projects Asst	\$ 51,237.68	\$ 53,440.90	\$ 64,047.36	\$ 66,801.40	\$ 76,857.04
	Carpenter III	\$ 27.76	\$ 28.95	\$ 30.79	\$ 32.11	\$ 36.95
	Electrical Journeyman					
	Plumber Journeyman					
G	Contracts/Fee for Service Coordinator	\$ 58,923.28	\$ 61,456.98	\$ 73,654.88	\$ 76,822.04	\$ 88,585.44
	Inspector (Resales)	\$ 28.33	\$ 29.55	\$ 35.41	\$ 36.93	\$ 42.49
	Master Electrician					
	Master Plumber					

ADMINISTRATIVE						
Grade	Job Title	Minimum	Min with 4.30% Adj.	Midpoint	Mid with 4.30% Adj.	Maximum
A	On-Call Assistants Receptionist	\$ 30,864.08 \$ 14.84	\$ 32,191.24 \$ 15.48	\$ 38,579.84 \$ 18.54	\$ 40,238.77 \$ 19.34	\$ 46,295.60 \$ 22.26
B	Accounting Clerk Secretaries Technical Assistants (HR Asst)	\$ 34,876.40 \$ 16.76	\$ 36,376.09 \$ 17.48	\$ 43,594.72 \$ 20.96	\$ 45,469.29 \$ 21.86	\$ 52,314.08 \$ 25.15
C	Bookkeeper Administrative Assistant	\$ 39,409.76 \$ 18.95	\$ 41,104.38 \$ 19.76	\$ 49,262.72 \$ 23.68	\$ 51,381.02 \$ 24.70	\$ 59,114.64 \$ 28.42
D	Executive Assistant Contract Processing Specialist Leasing Coordinator/Network Administrator	\$ 49,262.72 \$ 23.68	\$ 51,381.02 \$ 24.70	\$ 61,578.40 \$ 29.61	\$ 64,226.27 \$ 30.88	\$ 73,894.08 \$ 35.53
E	Accounting Manager Project Manager Maintenance Manager	\$ 61,578.40 \$ 29.61	\$ 64,226.27 \$ 30.88	\$ 76,972.48 \$ 37.00	\$ 80,282.30 \$ 38.59	\$ 92,367.60 \$ 44.41
F	Director of Human Resources Director of Member Services	\$ 76,972.48 \$ 37.00	\$ 80,282.30 \$ 38.59	\$ 96,215.60 \$ 46.26	\$ 100,352.87 \$ 48.25	\$ 115,458.72 \$ 55.50
G	Director of Technical Services Director of Homes Improvement Program Director of Maintenance Operations	\$ 92,367.60 \$ 44.41	\$ 96,339.41 \$ 46.32	\$ 115,458.72 \$ 55.50	\$ 120,423.44 \$ 57.89	\$ 138,550.88 \$ 66.61
H	Director of Finance Assistant General Manager	\$ 110,841.12 \$ 53.29	\$ 115,607.29 \$ 55.58	\$ 138,550.88 \$ 66.61	\$ 144,508.57 \$ 69.47	\$ 166,261.68 \$ 79.93
						\$ 173,410.93 \$ 83.13